STIC Search Report
EIC 3600

Scientific and Technical
Information Center

To: Examiner Paul Danneman	From: Matthew Hogan
Location: KNX-5D49	Location: EIC3600
Art Unit: 3627	KNX 2D08-B
Tuesday, December 28, 2010	Phone: (571) 272-6674
Case Serial Number: 09/470180	Matthew.Hogan@uspto.gov

Search Notes

Dear Examiner DANNEMAN:

Please find attached the results of your search for the above-referenced case. The search was conducted in Dialog, in EBSCOhost's I & PC Abstract databases, and in ProQuest's Financial Times database, as well as online. All mandatory databases for allowance were searched.

I have listed *potential* references of interest in the opening section of these search results. *However, please be sure to review the entire report*. There may be additional references that you find useful.

If you have any questions about the search, or need a refocus, please do not hesitate to contact me.

Thank you for using the EIC, and we look forward to your next search!

I. Potential References of Interest

13/3,K/7 (Item 1 from file: 621)
DIALOG(R)File 621: Gale Group New Prod.Annou.(R)
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01364037   **Supplier Number:** 46275793 **(USE FORMAT 7 FOR FULLTEXT)**
DCR UNVEILS NEW BLOOMBERG SERVICE

PR Newswire , p 0401NYM108
April 1 , 1996
Language: English   **Record Type:** Fulltext
Document Type: Newswire ; Trade
Word Count: 284
-
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The new service can be found by typing DCR <GO> and following the
menu prompts to access DCR's various corporate or structured finance
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13/3,K/6 (Item 1 from file: 275)
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01320538   **Supplier Number:** 07931076 **(Use Format 7 Or 9 For** FULL TEXT **)**

Software. (1990 Buyer's Guide Issue) (buyers guide)

Abstract: ...engineering, corporate finance, database management, decision support and project management, equities analysis, fixed income analysis, foreign exchange, graphics, insurance, investment analysis, micro-to-mainframe links, **mortgage** backed securities pricing, mutual fund pricing, options and futures, payroll, portfolio accounting, portfolio **performance** evaluation, portfolio management for brokers, portfolio management for money managers, program trading, prospecting for brokers, real estate investment analysis, sales support, spreadsheets, statistical analysis, stock...
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Calculates price, yield, duration, total return and others on governments, agencies, municipals, corporates, money markets, zero-coupons, mortgage-backed **securities** and stripped mortgage-backed **securities**.

Intel Solutions, Inc., 161 Highland Ave., Needham, MA 02194; Contact George Jigarjian; 617/449-6222, FAX: 617/444-2318 See Advertisement Pages 49, 65 Intex Mortgage Backed **Securities**

Calculations $395-$100,000 depending on functions and platform PC, Mini, Mainframe, Lotus 1-2-3

Computes quoted and cashflow yield, price, duration, weighted average life, balance, principal, interest, total payments. Handles constant or

implied prepayment rates, **index** ARM's. Intex CMO Calculations
$695-$200,000 depending on function and platform PC, Mini, Mainframe, Lotus
1-2-3
    Provides a comprehensive set of...

...OAS Calculations $8,000-$200,000 PC, Mini, Mainframe
    More accurately values interest-sensitive securities: MBS, ARM's,
CMO's, bonds. Accepts several prepayment models. **Fast** mode for
what-if analysis.
    MBSIS, 80 Wall St., Suite 614, New York, NY 10005 CMOSIS
    IBM PC, LANS, UNIX, IBM MVS, DEC/VMS CMO...

...Suite 514, San Francisco, CA 94104; Contact George Montgomery;
415/986-6991, 800/445-5663, FAX: 415/986-1922 See Advertisement Page 32
Mortgage Security **Calculator** $295
    A powerful and fast MBS calculator that not only calculates yields
but also 'real' duration and 'effective' converity.
    OBS Systems Inc., 115 Sansome St...

...122 E. 42nd St., New York, NY 10168; Contact Deborah A. Yamin;
212/682-8877, FAX: 212/697-5018 See Advertisement Page 161 Mortgage Backed
Securities Service
    Fixed income system handling mortgage-backed **securities.**
    Software Sciences, 55 Broad St., 16th Fl., New York, NY 10004;
Contact Reed Jarrell; 212/495-8200 See Advertisement Pages 7, 125 MBS
Decision Support...

...calculation for risk-adjusted positions. Factor information for GNMA,
FNMA and FHLMC pools.
    Synthetic Intelligence, Inc., 286 5th Ave., New York, NY 10001
Mortgage System $ **1,**700 & Up IBM-PC/MAC
    Automatically update the variable interest rate with prime rate
variation. Give history & managerial information distributed by ledger
(VA, FHA, etc...

...212/941-7330, FAX: 212/941-7334 See Advertisement Page 18 mbs @nalyst
$495
    Lotus 1-2-3 & Symphony, Microsoft Excel @ functions for
mortgage-backed **security** calculations in spreadsheets. Level-payment
and GPM's. Pass-throughs. IO's, PO's and other strips. CPR, PSA, FHA &
custom prepayment curve **supported.**
    Wall Street Analytics, 33-41 85th St., Jackson Heights, NY 11372
Structured Financing **Workstation** 386-PCs
    Professional quality package for structuring, pricing, and valuating
MBS including complex CMO/REMIC residuals. Includes Monte Carlo OAS
capabilities.
    Mutual Fund Pricing
    CMD...recommendations and specific option strategies.
    Aspen Research Group, Box 1370, Glenwood Springs, CO 81601 Apex $ On
Request IBM or Compatibles
    Real-time and historical technical **analysis** systems for
futures equities/forex/fixed income. High-resolution graphics, video news,
flexible quote screens, PC-based. Demo disk available.
    Automated Trading Systems, Inc., 40...

...True Compatibles
    An on-line, real time options analysis and strategy simulation system

that also allows users to track equity in real-time. Historical database **and** a variety of value-added services--including advisories-are also available. London Oil Report on FutureSource IBM-AT, IBM PS/2, & True Compatibles

Provides complete...Associates, 50 Meadow Lane, Zephyrhills, FL 33544 ProfitTaker $995 IBM Compatibles

Trading model development and simulation software lets you create and test high-performance trading **models** for all futures markets, then generates daily entry/exit signals.

Montgomery Investments, 332 Pine St., Suite 514, San Francisco, CA 94101; Contact George ,ontgomery; 415...Optionomic Systems $425/monthly IBM Compatible

Software for real-time risk management of futures options. Options & futures strategy simulations and complete database including historical & option **volatilities.**

OptionVue Systems International, 175 E. Hawthorne Pkwy., Suite 180, Vernon Hill, IL 60061 Optionvue IV $895 IBM PC family and all close Compatibles

A strategy...

...flexible set of user-entered criteria. ANALYZOR $ Based on usage Terminals, Pc's

Allows the trader to tap into Paradigm's database of historical and **daily** volatility data and perform statistical tests on the information. A very powerful tool.

PC Quote, Inc., 401 S. LaSalle St., Chicago, IL 60605; Contact Mktg ...

...functions for option pricing & sensitivity analysis in spreadsheets. Modified Black-Scholes and Binomial models. Holding cost and dividend adjustments. Delta, gamma, theta, etc. Historical and **implied** volatilities.

Technical Tools, 334 State St., Suite 204, Los Altos, CA 94022 Quote Butler $199 Many File Formats

File conversion utility lets you translate commodity...2.0 or higher, IBM PC-XT, PC-AT, PS/2

Includes management reporting and accounting, client reporting and billing, BAI and FAF performance measurement **compared** to indicies as well as optional link to DTC.

Ajay Financial Services Inc., 11 Reed Dr., Roslyn, NY 11576; Contact Harvey Sontag; 516/248-1608, FAX: 516/741-1861 See Advertisement Page 81 Dimension 3000 Hewlett Packard

Complete portfolio accounting functions, security level performance measurement, **analysis**, total reporting. Trading, historical prices, **asset** tracking, ability to handle any instrument, complete 'as of' capabilities.

Automated Reasoning Technologies, Inc., 975 Oak St., 6th Fl., Eugene, OR 97401 Personal Fiances with...

...Recordkeeping Module $150,000 & Up Digital VAX

Online, multi user portfolio accounting system; broad instrument handling capability, single or multi currency, table driven. Performance, Billing **and** Ad Hoc Report Writing available.

ComStock, 670 White Plains Road, Scarsdale, NY 10583; Contact Sales Department; 914/725-3477, 800/431-5019, FAX: 914/725...

...9370; S/88; Stratus

Multi-currency, portfolio management and securities accounting system supporting full-range of security types. Features include Schedule D reporting, performance measurement, **analysis**, reporting and cash management.

Hardan Group Inc., 160 E. 38th, New York, NY 10016 BONDCO $3,000-$40,000 IBM PC or Compatible

A user...

...on an IBM PC. The system calculates, maintains and produces: confirmations and delivery tickets; trade data blotters; sale and purchase settlement data blotters; historic database; **accounting** positions; trading positions; profit/loss, interest earned, interest accrued, amoritization; margin call amounts for financial futures; customer statements; stock record; and general ledger.

Information Systems 000 IBM and compatibles, DOS

The most automated, configurable single-user, in-house system with asset allocation, performance and **an** integrated modular structure with the most elegant growth path. Investment Manager II $8,000-$50,000 IBM and Compatibles, UNIX platforms

The most comprehensive, in-house, multi-user system with relational database flexibility, automated asset allocation, daily performance, accruals **and** analytics. The integrated, modular system solution.

Interactive Data Corp., Portfolio Services Div., Corp. Headquarters, 95 Hayden Ave., Lexington, MA 02173; Contact Jean Privitera; 203/521...

...CMS; Service Bureau

Multi-user portfolio management system handling over 35 asset types with trade/settlement accounting, automated income processing, report writer, BAI performance measurement, **links** to DTC, trading and analytical systems. Interport PC/Network

Designed in London and installed worldwide, is a portfolio management/accounting system for multi-currency holdings, generates valuations, accounting and performance measurement **reports**.

Interactive Planning Systems, 1800 Century Blvd. NE, Suite 800, Atlanta, GA 30345 Investment Portfolio Accounting $3,500 IBM PC, PS2 and Compatible

Complete portfolio management...

...MA 02181 PMIS DEC VAX/VMS

Comprehensive multi-currency portfolio management system for institutional investors or custodians. Application includes securities database, portfolio accounting, performance measurement, **analysis**, asset allocation, inquiry, trading and report generation.

R. H. Jones Inc., 3711 Misty Oak Dr., Memphis, TN 38125 IPMS $5M-$10M IBM AS/400, IBM...

...10022; Contact Jamie Waller; 212/888-6107, FAX: 212/888-2768 See Advertisement Page 100 PORTVUE IBM

System provides automated portfolio management and performance measurement **systems** to independent investment advisors, banks, broker/dealers and insurance companies. Includes transaction, realized gain/loss, and investment income summaries.

Sendero, 6900 E. Camelback, 3rd Fl...bonds. Includes a user report writer, 9 types of amortization (level yield), 3 methods of pricing over 100 standard reports, a bond calculator, mortgage calculator, **bond** swapper, GL interface. Multi and single user versions.

WFS, 101 Main St., Cambridge, MA 02142 Portfolio Applications

Provide complete accounting, operations, and management reporting functions...

...Wilshire Associates, 1299 Ocean Ave., Santa Monica, Ca 940401 Portfolio Management Service IBM AT, PS/2
Comprehensive service that provides investment accounting, daily performance and **customized** internal management reports. Supports equities, bonds, mortgages, and short term securities on a full accrual basis.
Wismer Associates, Inc., 22134 Sherman Way, Canoga Park, CA...

...real-time, stand-alone system, WyCASH operates in a mouse-driven multi-window environment, allowing for the concurrent use of multiple modules.
Portfolio Performance
Evaluation
Advent Software, Inc., 512 2nd St., San Francisco, CA 94107; Contact Lisa Church; 415/543-7696, 212/398-1188, FAX: 415/543-5020 See Advertisement Pages...
...2.0 or higher, IBM PC-XT, PC-AT, PS/2
Includes management reporting and accounting, client reporting and billing, BAI and FAF performance measurement **compared** to indicies as well as optional link to DTC.
Ajay Financial Services Inc., 11 Reed Dr., Roslyn, NY 11576; Contact Harvey Sontag; 516/248-1608, FAX: 516/741-1861 See Advertisement Page 81 Dimension 3000 Hewlett Packard
Complete, accurate portfolio performance measurement, **analyzing** investment portfolio on security level basis using BAI methodology. Allows user to examine security universe for 'winners and losers' over any time period.
BEA Management...

...Dir.-Mktg.; 212/755-4700, FAX: 212/755-4893 See Advertisement Pages 92, 93, 127 SEG PERF
Calculates and store daily time weighted performance returns, **historical** performance **and graphic** representation of account performance against **indices**. SEGPERF runs performance reports **on** user defined segments or sectors.
Belvedere Financial Systems, 321 Columbus Ave., Boston, MA 02116; Contact Eric Godes; 617/353-0800, FAX: 617/353-1648 See Advertisement Page 95 Belvedere Stand-Alone Performance System $ **On** Request HP-3000
Designed for pernsion consultants, this product provides stand alone performance measurement, **modern** portfolio theory statistics and full graphics capabilities. Can be linked to Belvedere Portfolio System or linked to the users current system.
Capital Software Development Corp...

...Pope; 303/329-3100 See Advertisement Page 61 The Expert Portfolio Manager $2,950 & Up IBM PC, AT, PS/2 & Compatibles
Optimize portfolio performance against **any** index/target using securities, futures, & options. Real-time market orientation, total horizon return, robust sensitivity analyses, presentation quality graphics, & flexible reporting.
CDA Investment Technologies, Inc., 1355 Piccard Dr., Rockville, MD 20850 CADENCE Performance Measurement **Software** IBM PC-Compatible systems
Within the CADENCE family are products which provide performance

measurement **reports**, asset mix analyses and comparative statistics covering the historical performance **of various** market indexes, mutual funds, bank pooled funds, insurance comply funds and investment advisors. CADENCE performance measurement **services** are available in a variety of formats, including hardcopy publications, PC-Compatible software, mag tapes and online.

Coherent Software Systems, 771 Anthony Road, Portsmouth, RI 02871 Rory Tycoon Analyst $150 IBM PC/XT/AT

A comprehensive program combining portfolio management, historical and **real**-time charting, and electronic quote retrieval on 2500 ... True Compatibles

An on-line, real time options analysis and stragegy simulation system that also allows users to track equity in real-time. Historical database **and** a variety of value-added services--including advisories-are also available.

Data Exchange, Inc., 521 5th Ave., New York, NY 10017; Contact Naresh Jessani; 212/983-3400, FAX: 212/286-8028 See Advertisement Page 128 DX/Performance System $ **On** Request DEC VAX, Wang VS

Measures portfolio performance at **the** portfolio and asset class level. Functions include dollar and time-weighted calculations, inception reporting, composites and numerous standard reports.

Data Resources, Inc., McGraw-Hill, 24 Hartwell Ave., Lexington, MA 02173 Performance Monitoring **Services**

Measures portfolio performance, compares **industry**/economic sector to portfolio returns, monitors market trends, customizes indexes for analysis, backtests portfolios.

FAME Software Corp., 77 Water St., 22nd Fl., New York, NY...

...graphs, reports, statistics and system building. FAMES's Research-Pak $ On Request DEC(VMS) IBM (370 VM)

Software which integrates commercial and private historical databases **such** as fundamental, pricing, economic and earnings estimates, enabling screening and analysis of any combination. Seamless PC $ On Request DEC(VMS)

From within LOTUS, pop up menus to directly screen and download historical fiaancial **data** stored on your host computer without needing intermediate files.

Financial Models Company, Inc., 60 Bloor Street West, Suite 306, Toronto, ON M4W 3B8 PERSYS FMC PACER

Performance measurement **system** calculates internal and time weighted rates of return over used specified time spans, compares to indices, performance attribution **available**.

Genesis Financial Data Services, Box 150628, Arlington, TX 76015

Hale Systems, Inc., 195 Main St., Box 695, Lee, MA 01238

Harborview Systems, Inc., 15 Broad St., Boston, MA 02109 SMART $ On Request IBM S/370; 9370; S/88; Stratus

Multi-currency performance evaluation **software** conforming to both BAI and FAF standards. Supports all major instruments with flexible reporting, sector/group valuations and index matching.

Integrated Decision Systems, 1950 Sawtell...

...Investment Manager I $1,500-$4,000 IBM and compatibles, DOS

The most automated, configurable single-user, in-house system with asset allocation, performance and **an** integrated modular structure with the most elegant growth path. Investment Manager II $8,000-$50,000 IBM and Compatibles, UNIX platforms

The most comprehensive, in-house, multi-user system with relational

database flexibility, automated asset allocation, daily performance, accruals **and** analytics. The integrated, modular system solution.

Ineractive Data Corp., Portfolio Services Div., Corp. Headquarters, 95 Hayden Ave., Lexington, MA 02173; Contact Jean Privitera; 203/521...

...FAX: 203/521-0396 See Advertisement Page 16 Passport PC/Network (Multi-user)

Portfolio management system with BAI standard time and dollar weighted performance, asset **groupings** for sector performance and **comparisons** with over 100 indices. Interport PC/Network

Designed in London and installed worldwide, is a portfolio management/accounting system for multi-currency holdings, generates valuations, accounting and performance measurement **reports.**

ITS Associates, Inc., 36 Washington St., Wellesley, MA 02181 PMIS DEC VAX/VMS

Comprehensive multi-currency portfolio management system for institutional investors or custodians. Application includes securities database, portfolio accounting, performance measurement, **analysis,** asset allocation, inquiry, trading and report generation.

National Computer Systems, 400 Northridge Road, Atlanta, GA 30350 ULTRUST Integrated Asset Management System $ On Request DEC VAX...

...broker needs in one fully integrated, easy-to-use system. Dramatically increases productivity.

OBS Systems Inc., 115 Sansome St., San Francisco, CA 94104

Performance Technologies, **4814** Old Wake Forest Road, Raleigh, NC 27609 CENTERPIECE $895 IBM PC, XT, AT, PS/2 or Compatible

Produces 32 clear, comprehensive reports, performance and **analytical** measures, detailed tax lot accounting, and decision support tools. Real-time interface with Lotus Signal available.

Performance Technologies, **Inc.,** 4024 Barrett Dr., #202, Raleigh, NC 27609 CENTERPIECE $895 IBM PC, XT, AT, PS/2 or Compatible

Produces 32 clear, comprehensive reports, performance and **analytical** measures, detailed tax lot accounting, and decision support tools. Real-time interface with Lotus Signal available.

Plaid Brothers Software, 17952 Skypark Circle, Suite K, Irvine... 10022; Contact Jamie Waller; 212/888-6107, FAX: 212/888-2768 See Advertisement Page 100 PORTVUE IBM

System provides automated portfolio management and performance measurement **systems** to independent investment advisors, banks, broker/dealers and insurance companies. PM TRUST IBM

Low cost, high-resolution performance. Calculated **on** a time-weighted or dollar-weighted basis with unlimited performance sectors. **Ability** to maintain virtually all TRUST portfolios on a cost-effective basis.

Sendero, 6900 E. Camelback, 3rd Fl., Scottsdale, AZ 85251

Shaw Data Services, Inc., 122 E. 42nd St., New York, NY 10168; Contact Deborah A. Yamin; 212/682-8877, FAX: 212/697-5018 See Advertisement Page 161 Performance Capabilities

Provides daily time-weighted total returns, as well as monthly dollar-weighted returns for total portfolio and five segments. Performance Attribution **System**

Calculates and reports portfolio returns for not only total but up to 99 different client directed sectors, industries, currencies and asset classes.

Tech Hackers, 515...

...functions for option pricing & sensitivity analysis in spreadsheets. Modified Black-Scholes and Binomial models. Holding cost and dividend adjustments. Delta, gamma, theta, etc. Historical and **implied** volatilities. mbs @nalyst $495

Lotus 1-2-3 & Symphony, Microsoft Excel @ functions for mortgage-backed **security** calculations in spreadsheets. Level-payment and GPM's. Pass-throughs. IO's, PO's and other strips. CPR, PSA, FHA & custom prepayment curve **supported.** stats @nalyst $195

Lotus 1-2-3 & Symphony, Microsoft Excel Add-in library of 48 probability and statistics functions for spreadsheets. Includes descriptive, parametric and...

...on unlimited number of securities and equity, fixed income and balanced portfolios.

Wall Street Analytics, 33-41 85th St., Jackson Heights, NY 11372
Structured Financing **Workstation** 386-PCs
Professional quality package for structuring, pricing, and valuating MBS including complex CMO/REMIC residuals. Includes Monte Carlo OAS capabilities.
Wyatt Software Services, Inc...

...2
The only hard disk based system supporting equity research functions using Zacks, Compustat and Valueline databases. Particularly good choice for normal portfolio performance and **performance** fee **calculations.**
Portfolio Management for
Brokers
Advent Software, Inc., 512 2nd St., San Francisco, CA 94107; Contact Lisa Church; 415/543-7696, 212/398-1188, FAX: 415 reporting, IRR performance as **well** as cross referencing and trade blotter.
AME Financial Services, Inc., 6413 Congress Ave., Suite 200, Boca Raton, FL 33487 Broker Portfolio System $1,500 PC...

...McDonald, Dir.-Mktg.; 212/755-4700, FAX: 212/755-4893
See Advertisement Pages 92, 93, 127 PERF
Calculates and store daily time weighted performance returns, **historical** performance **and graphic** representation of account performance against **indices.** SEGPERF runs performance reports **on** user defined segments or sectors. PARTS $ On Request UNIX and Proprietary Hardware Platforms
The most functionally complete, fully integrated, real time, on-line system available...

...collects updated prices from Dow Jones News/Retrieval at user-specified time, contains a calendar of financial activity, and calculates security and portfolio performance.
Emerging **Market** Technologies, 3781 Presidential Pkwy., Suite 10, Atlanta, GA 30341; Contact Jeffrey Multz; 404/457-2110, FAX: 404/457-8438 See Advertisement Pages 17, 134 BPS...

...Investment Manager I $1,500-$4,000 IBM and compatibles, DOS
The most automated, configurable single-user, in-house system with asset allocation, performance and **an** integrated modular structure with the most elegant growth path. Investment Manager II $8,000-$50,000 IBM and Compatibles, UNIX platforms
The most comprehensive, in-house multi-user system with relational

database flexibility, automated asset location, daily performance, accruals **and** analytics. The integrared, modular system solution.
    McFadden Portfolio Analytic, Box 989, Plainfield, NJ 07061-0989
    Money Management Systems, 1000 Winter St., Waltham, MA 02154
MoneyMarket...terminal charges
    A powerful real-time computation of portfolios. Values are computed
tick by tick and are available for monitoring on quote pages.
    Performance Technologies, **4814** Old Wake Forest Road, Raleigh,
NC 27609 CENTERPIECE $895 IBM PC, XT, AT, PS/2 or Compatible
    Produces 32 clear, comprehensive reports, performance and
analytical measures, detailed tax lot accounting, and decision
support tools. Real-time interface with Lotus Signal available.
    Performance Technologies, **Inc.**, 4024 Barrett Dr., #202,
Raleigh, NC 27609 CENTERPIECE $895 IBMBM PC, XT, AT,PS/2 or Compatible
    Produces 32 clear, comprehensive reports, performance and
analytical measures, detailed tax lot accounting, and decision
support tools. Real-time interface wiht Lotus Signal available.
    Plaid Brothers Software, 17952 Skypark Circle, Suite K, Irvine...

...functions for option pricing & sensitivity analysis in spreadsheets.
Modified black-Scholes and Binomial models. Holding cost and dividend
adjustments. Delta, gamma, theta, etc. Historical and **implied**
volatilities.
    mbs @nalyst $495
    Lotus 1-2-3 & Symphony, Microsoft Excel @ functions for
mortgage-backed **security** calculations in spreadsheets. Level-payment
and GPM's. Pass-throughs. IO's, PO's and other strips. CPR, PSA, FHA &
custom prepayment curve **supported.**
    stats @nalyst $195
    Lotus 1-2-3 & Symphony, Microsoft Excel Add-in library of 48
probability and statistics functions for spreadsheets. Includes
descriptive, parametric and...

...Hobbs; 206/747-5598, 800/826-8082 See Adverstisement Page 32 CAPTOOL $79
IBM PCs/Compatibles
    Combines portfolio and client management, portfolio ROI performance
and **stock**/bond evaluation. Virtually all security and transaction
types. Price downloading.
    Towers Data Systems, 8033 Herb Farm Dr., Bethesda, MD 20817; Contact
Jim Hendren; 301/469...2.0 or higher, IBM PC-XT, PC-AT, PS/2
    Includes management reporting and accounting, client reporting and
billing, BAI and FAF performance measurement **compared** to indicies as
well as optional link to DTC.
    Ajay Financial Services Inc., 11 Reed Dr., Roslyn, NY 11576; Contact
Harvey Sontag; 516/248-1608, FAX: 516/741-1861 See Advertisement Page 81
Dimension 3000 Hewlett Packard
    Combines the comprehensive features and capabilities of portfolio
accounting and portfolio performance measurement **in** a unique
processing environment, including trading system and MBS.
    Belvedere Financial Systems, 321 Columbus Ave., Boston, MA 02116;
Contact Eric Godes; 617/353-0800, FAX...

...trading system. Includes block trading, model portfolio building with
intracative analysis on client accounts, multi-currency capabilities,
pricing interfaces, graphics and accrual calculator, performance
calculations, **corporate** action support, and more. Handles all
security types. Includes many standard reports and report writer. Belvedere

Portfolio $ On Request Hewlett Packard 3000
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system. Handles full general ledger accounting and posting, cash
management, capital changes, pricing link, performance measurement,
graphics, full audit trail, all types of securities. Over 70 reports
with standard formats. Basic Micro-3000 supports 24 terminals; up to
hundreds on moded 70...

...trader to multiple trading desks in different locations. Tracks open
orders, executed trades, automatically calculates trade allocations.
End-of-day processing links.
    Belvedere Mortgage Backed **Trading** System $ On Request HP-3000
    Allows Brokers to allocate pools by original face value, with the
system performing necessary current face value and variance calculations...

...63 BondEdge IBM PC, AT, PS/2, Compaq, 100% IBM Compatible
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complete bond database option, mortgage, CMO **and** private placement
models; portfolio apprisals, what ifs, return simulations; import/export;
graphics. Compare
    IBM PC, AT, PS/2, Compaq, 100% IBM Compatible
    PC product that...
...Compatible
    Optimize a portfolio to match an index or rebalance to target
duration. Constraints include minimum and maximum pars, sector and quality
weightings. Performance Attribution (**PART**)
    IBM PC, AT, PS/2, Compaq, 100% IBM Compatible
    Identify the sources of portfolio and index returns; includes
multiple graphics. Asset/Liability Management
    IBM PC...

...Pope; 303/329-3100 See Advertisement Page 61
    The Expert Portfolio Manager $2,950 & Up IBM PC, AT, PS/2 &
Compatibles
    Optimize portfolio performance against **any** index/target using
securities, futures, & options. Real-time market orientation, total
horizon return, robust sensitivity analyses, presentation quality graphics,
& flexible reporting.
    FutureSource, 955 Parkview Blvd...

...True Compatibles
    An on-line, real time options analysis and strategy simulation system
that also allows users t track equity in real-time. Historical database
and a variety of value-added services -- including advisories-are
also available.
    Computer Aided Decisions, Inc., 31 Milk St., Boston, MA 02109
    EPVS Trade and Orde...

...DX/V Investment Management System $ On Request DEC VAX, Wang VS
    The proven system for institutional money managers. Modules include
accounting, reporting, biling, performance, DTC, **pricing** and
real-time market data. The system is in use with managers up to $22 billion
with 100 concurrent workstations.
    Decision Programming, 8701 Georgia Ave...

...8438 See advertisement Pages 17, 134 Centerpiece $ On Request IBM PC's
& Compatibles

Ideal system for money managers which contains easy-to-understand performance reports.

Financial Models Company, Inc., 60 Bloor Street West, Suite 306, Toronto, ON M4W 3B8 PACER DEC VAX/VMS

Multicurrency, multilingual system supporting U.S. and international ...The system prices a corporate bond with embedded options in 1/3 of a second. Other securities include private placements, futures and options, mortgage-backed **securities**, bank assets, medium-term notes, GICs, liabilities. Applications include bond swap analysis, scenario testing, return attribution against an index, dedication, immunization, hedging. Integrative Bond System...

...9370; S/88; Stratus

Portfolio management and securities accounting system supporting full-range of security types. Features include support of fixed-income instruments, performance measurement **and** flexible reporting.

Information Systems of America, 500 Northridge Road, Atlanta, GA 30350; Contact ISA Sales Department; 404/548-6800, 800/554-1193, FAX: 404/587...

...Investment Manager I $1,500-$4,000 IBM and compatibles, DOS

The most automated, configurable single-user, in-house system with asset allocation, performance and **an** integrated modular structure with the most elegant growth path. Investment Manager II $8,000-$50,000 IBM and Compatibles, UNIX platforms

The most comprehensive, in-house, multi-user system with relational database flexibility, automated asset allocation, daily performance, accruals **and** analytics. The integrated, modular system solution.

Interactive Data Corp., Portfolio Services Div., Corp. Headquarters, 95 Hayden Ave., Lexington, MA 02173; Contact Jean Privitera; 203/521...

...CMS; Service Bureau Multi-user portfolio management system handling over 35 asset types with trade/settlement accounting, automated income processing, report writer, BAI performance measurement, **links** to DTC, trading and analytical systems. Interport PC/Network

Interport, designed in London and installed worldwide, is a portfolio management/ accounting system for multi-currency holdings, generates valuations, accounting and performance measurement **reports.**

Investment Software Systems, Inc., 1000 Massachusetts Ave., Boxborough, MA 01719 ISS MarketData Services Sun, Wang

Integrates multiple digital data feeds which allows users to: organize; interpret; manipulate; and display information distributed by real-time and historical data **providers.** ISS MarketData Processor Sun, Wang

Dynamically integrates real-time market data with real or model portfolios. Data can be integrated with accounting systems, WP, PC...

...MA 02181 PMIS DEC VAX/VMS

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Leveraged Technology, Inc., 61 Broadway, New York, NY 10006 Global Security System $50K-$500K PC/LANs, HP-3000...terminal charges

A powerful real-time computation of portfolios. Values are computed tick by tick and are available for monitoring on quote pages.

Performance Technologies, **4814** Old Wake Forest Road, Raleigh,

NC 27609 CENTERPIECE $ 895 IBM PC, XT, AT, PS/2 or Compatible
     Produces 32 clear, comprehensive reports, performance and
analytical measures, detailed tax lot accounting, and decision
support tools. Real-time interface with Lotus Signal available.
     Performance Technologies, **Inc.**, 4024 Barrett Dr., #202,
Raleigh, NC 27609 CENTERPIECE $ 895 IBM PC, XT, AT, PS/2 or Compatible
     Produces 32 clear, comprehensive reports, performance and
analytical measures, detailed tax lot accounting, and decision
support tools. Real-time interface with Lotus Signal available.
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...Systems
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Integrated to quote services and back office systems. Links to word
processing & general ledger software.
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     A mainframe-based financial downloading service that provides
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currency and money market rates, indices and market indicators for analyses
in several spradsheet formats on the PC.
     Reuters Historical Information, **153** Kearney At., san
Francisco, CA 94101 Pricelink
     A mainframe-based financial downloading service that provides
domestic and international historical and **current** pricing data,
currency and money market rates, indices and market indicators for analyses
in several spreadsheet formats on the PC.
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60603 Pricelink
     A mainframe-based financial downloading service that provides
domestic and international historical and **current** pricing data,
currency and money market rates, indices and market indicators for analyses
in several spreadsheet formats on the PC.
     Reuters Historical Information, **53** State St., Boston, MA 02109
Pricelink
     A mainframe-based financial downloading service that provides
domestic and international historical and **current** pricing data,
currency and money market rates, indices and market indicators for analyses
in several spreadsheet formats on the PC.
     Reuters Historical Information, **61** Broadway, Manhattan, NY
10006 Pricelink
     A mainframe-based financial downloading service that provides
domestic and international historical and **current** pricing data,
currency and money market rates, indices and market indicators for analyses
in several spreadsheet formats on the PC.
     Reuters Historical Information, **121** King St. W., Toronto, ON
M5H 3X5 Pricelink
     A mainframe-based financial downloading service that provides
domestic and international historical and **current** pricing data,
currency and money market rates, indices and market indicators for analyses
in several spreadsheet formats on the PC.
     Reuters Historical Information, **2600** SW Frwy., Houston, TX
77013 Pricelink
     A mainframe-based financial downloading service that provides
domestic and international historical and **current** pricing data,
currency and money market rates, indices and market indicators for analyses
in several spreadsheet formats on the PC.

SD Financial, Inc., 101 Main...

...10022; Contact Jamie Waller; 212/888-6107, FAX: 212/888-2768 See Advertisement Page 100 PORTVUE IBM
System provides automated portfolio management and performance measurement **systems** to independent investment advisors, banks, broker/dealers and insurance companies.
SEI Corp., 680 E. Swedesford Road, Wayne, PA 19087 INVEST 3000 IBM 3090, 438X, 9370 Request IBM & Compatibles (MS-DOS)
Microcomputer based real time portfolio management system. Over 100 reports, BAI performance measurement, **flexible** report writer, client billing system. Integrate with real time marketdata, 3rd party software.
Social Software, 250 S. End Ave., #317, New York, NY 10280
Tech...

...functions for option pricing & sensitivity analysis in spreadsheets. Modified Black-Scholes and Binomial models. Holding cost and dividend adjustments. Delta, gamma, theta, etc. Historical and **implied** volatilities. mbs @nalyst $495 Lotus 1-2-3 & Symphony, Microsoft Excel
@ functions for mortgage-backed **security** calculations in spreadsheets. Level-payment and GPM's. Pass-throughs. IO's, PO's and other strips. CPR, PSA, FHA & custom prepayment curve **supported.** stats @nalyst $195 Lotus 1-2-3 & Symphony, Microsoft Excel
Add-in library of 48 probability and statistics functions for spreadsheets. Includes descriptive, parametric and...

...Contact R. Hobbs; 206/747-5598, 800/826-8082 See Advertisement Page 32 PFPRO $695 IBM PCs/Compatibles
Provides portfolio management with ROI performance reporting **of** money managers. Virtually all security and transaction types. Fee computation and price downloading.
Thompson Financial Networks, First Call, 11 Farnsworth St., Boston, MA 02210 First...

...portfolio management for those utilizing mutual funds as the primary investment vehicle. This integrated package combines portfolio management with technical analysis. Produces composite performance figures.
Towers Data Systems, 8033 Herb Farm Dr., Bethesda, MD 20817; Contact Jim Hendren; 301/469-6699, FAX: 301/469-6714 See Advertisement Pages 96-97 Valport...

...bonds. Includes a user report writer, 9 types of amortization (level yield), 3 methods of pricing over 100 standard reports, a bond calculator, mortgage calculator, **bond** swapper, GL interface. Multi and single user versions.
Wyatt Software Services, Inc., 5335 SW Meadows Road, Suite 200, Lake Oswego, OR 97035
AIM (Asset Investment...6475 Christie Ave., Emeryville, CA 94608 Sybase $2,495-$100,000
VMS, UNIX, HP, IBM, PC's, Stratus, Apple, Next
The proven high performance, distributed **relational** database management and development system for on-line applications. Only Sybase handles both transaction processing and decision support with one system.
TMI Engineering, London Terrace...duration, convexity, and others. Calculates total return. Handles interest at maturity, odd, stepped, or unequal coupon calculations. Works with Intex MBS calculations. Intex Mortgage Backed **Securities** Calculations $395-$695 PC, Mini,

Mainframe, Lotus 1-2-3
     Computes quotd and cashflow yield, price, duration, weighted average
life, balance, principal, interest, total payments. Advanced handles
implied prepayment rates, **index** ARM's, total return, BEY. Intex CMO
Calculations $695 PC, Mini, Mainframe, Lotus 1-2-3
     Provides a comprehensive set of calculations and analytical tools...
functions for option pricing & sensitivity analysis in spreadsheets.
Modified Black-Scholes and Binomial models. Holding cost and dividend
adjustments. Delta, gamma, theta, etc. Historical and **implied**
volatilities. mbs @nalyst $495
     Lotus 1-2-3 & Symphony, Microsoft Excel @ functions for
mortgage-backed **security** calculations in spreadsheets. Levelpayment
and GPM's. Pass-through. IO's, PO's and other strips. CPR, PSA, FHA &
custom prepayment curve **supported**. stats @nalyst $195
     Lotus 1-2-3 & Symphony, Microsoft Excel Add-in library of 48
probability and statistics functions for spreadsheets. Includes
descriptive, parametric and...

...100 S. Wacker Dr., Suite 1506, Chicago, IL 60606 TA-SRV $350 286/386
Compatibles
     Real time multitasking data server provides live and historic quotes
to Microsoft Excel, Real Tick III and other compatibles programs.
Uses Microsoft DDE protocol.
     UniPress Software, 2025 Lincoln Hwy., Edison, NJ 08817; Contact Sue
Glassberg; 201...DOS, Signal Windows, Metastock
     Ranks all NYSE & major OTC stocks every night. Based on up to 30
short and long-run technical indicators. Historical data **also**
available.
     FAME Software Corp., 77 Water St., 22nd Fl., New York, NY 10043
FAMES's Research-Pak $ On Request DEC(VMS) IBM (370 VM)
     Software which integrates commercial and private historical databases
such as fundamental, pricing, economic and earnings estimates,
enabling screening and analysis of any combination. Seamless PC $ On
Request DEC(VMS)
     From within LOTUS, pop up menus to directly screen and download
historical financial **data** stored on your host computer without
needing intermediate files.
     ...IBM compatible PC's
     Backoffice administration of investment products with multiple
investors-partnerships, REIT's, trusts, mutual funds, prepares 1099's,
K1's, mortgage servicing, **broker**-dealers commissions and all
supporting schedules.
     Emerging Market Technologies, 3781 Presidential Pkwy., Suite 10,
Atlanta, GA 30341; Contact Jeffrey Multz; 404/457-2110, FAX: 404...

...user to import other indicators.
     Aspen Research Group, Box 1370, Glenwood Springs, CO 81601 Apex $ On
Request IBM or Compatibles
     Real-time and historical technical **analysis** systems for
futures equities/forex/fixed income. High-resolution graphics, video news,
flexible quote screens, PC-based. Demo disk available.
     Automated Investments, 3284 Yonge St...DOS, Signal Windows, Metastock
     Ranks all NYSE & major OTC stocks every night. Based on up to 30
short and long-run technical indicators. Historical data **also**
available. Stock Market Predictor $3,000 MS/DOS, Signal Windows
     Permits detailed testing and analysis of EIA ranking algorithm. User
can vary importance of indicators create historical ranking **data**

bases, and test for performance.

Fortunet, **Inc.**, 2995 Woodside Road, #400, Woodside, CA 94062

Futures Software Associates, Inc., Box 263, Lima, PA 19037 Market Research Language $499 IBM PC, XT, AT, System covering all major markets. Includes integrated communications and data management modules for automatic downloading of historical and **daily** updating of data.
Market Maker International $795 IBM PC, AT, PS/2, 386

Same as Marker Maker but database coverage includes access to historical data **on** all major markets in over 50 countries, usually within a local phone call from anywhere in the world.

Intermountain, 10900 NE 8th St., #900, Bellevue...

...analysis capabilities.

Knight-Ridder Commodity News Services, 2100 W. 89th St., Leawood, KS 66206 CNS Analyst II IBM PC

Blends technical analysis and historical charts, **real**-time futures and options quotes, worldwide news and commodity cash prices into one system. Includes CBOT Market Profile (R). MoneyCenter AT&T PC

Offers international and domestic futures and options, equities, cash foreign exchange and U.S. government securities quotes, worldwide news, cash commodity prices plus intraday and historical charts.

Market Trend Software, RD 1, Box 193C, Rome, NY 13440 Major Market Move Indicator (MMMI) $89.95 IBM PC

The MMMI is a trend indicator for...
...the charting capabilities of Master Chartist.

RTR Software, Inc., 3901 N. Mesa, #407, El Paso, TX 79902 TechniFilter Plus $299 Various Data Sources

Historical testing **and** optimizing of user supplied trading systems. Technical screening of large databases for user supplied criteria.

Savant Corp., 11211 Katy Frwy., Suite 250, Houston, TX 77079...

...directly supported.

Townsend Analytics, 100 S. Wacker Dr. Suite 1506, Chicago IL 60606 Real Tick III $1,200 286/386 Compatibles

Real time & historic graphics **of** equities, futures, stocks and indicies. ...Estate

Administration

Comcon Associates, Inc., Box 1368, Golden, CO 80402 MORTS-80 (TM) $4,495 IBM PC-XT, AT, and PS/2

Residential Mortgage Loan **Servicing** and Accounting system designed for the small to medium size lender. Features include: Investor Reporting, IRS Forms Generation, Escrow Analysis.

Dynatron Corp., 210 Automation Way...

...systems: IBM OS, MVS; Language: COBOL

A real-time modular system supporting securities trading, clearance and custody. Includes extensive automated links to DTC, mortgage-backed **processing** and a program trading interface for trade list processing.

M & I Data Services, 770 N. Water St., Milwaukee, WI 53202 M&I Trust Services & Software...

...3000 IBM 3090, 438X, 9370

An on-line trust accounting and management information system that supports portfolio analysis, investment accounting, trade-order processing, performance measurement, **employee** benefit and client administration. Security Movement and Control (SMAC), an integrated Subsystem of TRUST

3000, controls the movement of securities from execution through
settlement.
    Shepard...

...without spending long hours doing complex mathematical calculations and
filling out routine forms.
    Synthetic Intelligence, Inc., 286 5th Ave., New York, NY 10001
Mortgage System $**1**,700 & Up IBM-PC/MAC
    Automatically update the variable interest rate with prime rate
variation. Give history & managerial information distributed by ledger
(VA, FHA, etc...Opt-Tech Data Processing, Box 678, Zephyr Cove, NV 89448
Opt-Tech Sort $149 IBM PC/XT/AT/PS/2
    General purpose, high performance sort/**merge**/select utility.
Can be called from programs or used as standalone routine. Scroll &
Recall $69 IBM PC/AT/XT/PS/2
    Allows you to page...100 S. Wacker Dr., Suite 1506, Chicago, IL 60606
TA-SRV $350 286/386 Compatibles
    Real time multitasking data server provides live and historic quotes
to Microsoft Excel, Real Tick III and other compatibles programs.
Uses Microsoft DDE protocol. Real Tick III $1,200 286/386 Compatibles
    Real time & historic graphics **of** equities, futures, stocks
and indicies. Implemented under Microsoft Windows. Many technical studies
plus CBOT market profile(R) on multiple programmable pages. Option Risk
Management 286...

...Harvey Sontag, 516/248-1608, FAX: 516/741-1861 See Advertisement Page 81
Dimension 3000 Hewlett Packard
    Portfolio management software, encompassing MBS, accounting,
performance evaluation, **trading** system, and dynamic financial
reporting system for professional money managers and institutional
investors.
    Alpine Data, Inc., 737 S. Townsend Ave., Montrose, CO 81401 OIL/PACK
...section 89.
    Comcon Associates, Inc., Box 1368, Golden, CO 80402 MORTS-80 (TM)
$4,495 IBM PC-XT, AT, and PS/2
    Residential Mortgage Loan **Servicing** and Accounting system
designed for the small to medium size lender. Features include: Investor
Reporting, IRS Forms Generation, Escrow Analysis.
    Computer Associates International, Inc., 711...ProMod/SART
$2,995/base MS-DOS and Digital VMS
    Part of the CASE (Computer Aided Software Engineering) tools from
Promod Inc., supports Structured Analysis (**Yourdon**/DeMarco) with
Real Time Extensions (Boeing/Hatley), and includes extensive consistency
and completeness checking with automatic leveling and balancing. Multiple
reports for graphical and textual resource, **utilization**, service
levels, throughput and threshold exceptions.
    TCAM Systems, Inc., 50 Broad St., New York, NY 10004; Contact Jay
Fuchs; 212/269-0200, FAX: 212/344...

10/5.K/2 (Item 1 from file: 583)
DIALOG(R)File 583: Gale Group Globalbase(TM)

06179462
MobileQuote gets a five-fold boost

HONG KONG: MOTOROLA LAUNCHES NEW MOBILEQUOTE
South China Morning Post (XKT)   18 Jul 1995   TP p.5
Language: ENGLISH

Motorola AirCommunications has launched a new version of MobileQuote in Hong Kong. The wireless investment services application will provide mobile and immediate financial information 24 hours a day and will enable **investors** to track, **analyse** and **chart forex information**. It will use Motorola's Personal Messenger PM100D wireless modem to communicate over AirComms network. The **forex** and data news will be supplied by Knight-Ridder and stock market information will come directly from the Hong Kong Stock Exchange. *

Company: HONG KONG STOCK EXCHANGE; KNIGHT-RIDDER; MOTOROLA AIRCOMMUNICATIONS

Product: Computer Software (7372);
Event: Product Design & Development (33);
Country: Hong Kong (9HON); United States (1USA);

II. Inventor Search

A. Dialog

File 348:EUROPEAN PATENTS 1978-201051
    (c) 2010 European Patent Office
File 349:PCT FULLTEXT 1979-2010/UB=20101223|UT=20101216
    (c) 2010 WIPO/Thomson
File 485:Accounting & Tax DB 1971-2010/Dec W3
    (c) 2010 ProQuest Info&Learning
File 625:American Banker Publications 1981-2008/Jun 26
    (c) 2008 American Banker
File 268:Banking Info Source 1981-2010/Dec W3
    (c) 2010 ProQuest Info&Learning
File 626:Bond Buyer Full Text 1981-2008/Jul 07
    (c) 2008 Bond Buyer
File 267:Finance & Banking Newsletters 2008/Sep 29
    (c) 2008 Dialog
File 637:Journal of Commerce 1986-2010/Dec 18
    (c) 2010 UBM Global Trade
File 608:MCT Information Svc. 1992-2010/Dec 28
    (c) 2010 MCT Information Svc.
File 13:BAMP 2010/Dec 27
    (c) 2010 Gale/Cengage
File 75:TGG Management Contents(R) 86-2010/Dec W2
    (c) 2010 Gale/Cengage
File 95:TEME-Technology & Management 1989-2010/Oct W3
    (c) 2010 FIZ TECHNIK
File 647:UBM Computer Fulltext 1988-2010/Dec W3
    (c) 2010 UBM, LLC
File 674:Computer News Fulltext 1989-2006/Sep W1
    (c) 2006 IDG Communications
File 15:ABI/Inform(R) 1971-2010/Dec 27
    (c) 2010 ProQuest Info&Learning
File   9:Business & Industry(R) Jul/1994-2010/Dec 27
    (c) 2010 Gale/Cengage
File 610:Business Wire 1999-2010/Dec 28
    (c) 2010 Business Wire.
File 810:Business Wire 1986-1999/Feb 28
    (c) 1999 Business Wire
File 275:Gale Group Computer DB(TM) 1983-2010/Nov 10
    (c) 2010 Gale/Cengage
File 624:McGraw-Hill Publications 1985-2010/Dec 27

(c) 2010 McGraw-Hill Co. Inc
File 621:Gale Group New Prod.Annou.(R) 1985-2010/Nov 01
    (c) 2010 Gale/Cengage
File 636:Gale Group Newsletter DB(TM) 1987-2010/Dec 27
    (c) 2010 Gale/Cengage
File 613:PR Newswire 1999-2010/Dec 28
    (c) 2010 PR Newswire Association Inc
File 813:PR Newswire 1987-1999/Apr 30
    (c) 1999 PR Newswire Association Inc
File 16:Gale Group PROMT(R) 1990-2010/Dec 21
    (c) 2010 Gale/Cengage
File 160:Gale Group PROMT(R) 1972-1989
    (c) 1999 The Gale Group
File 634:San Jose Mercury Jun 1985-2010/Dec 26
    (c) 2010 San Jose Mercury News
File 148:Gale Group Trade & Industry DB 1976-2010/Dec 27
    (c) 2010 Gale/Cengage
File 20:Dialog Global Reporter 1997-2010/Dec 28
    (c) 2010 Dialog
File 35:Dissertation Abs Online 1861-2010/Nov
    (c) 2010 ProQuest Info&Learning
File 583:Gale Group Globalbase(TM) 1986-2002/Dec 13
    (c) 2002 Gale/Cengage
File 65:Inside Conferences 1993-2010/Dec 23
    (c) 2010 BLDSC all rts. reserv.
File   2:INSPEC 1898-2010/Dec W2
    (c) 2010 The IET
File 474:New York Times Abs 1969-2010/Dec 28
    (c) 2010 The New York Times
File 475:Wall Street Journal Abs 1973-2010/Dec 28
    (c) 2010 The New York Times
File 99:Wilson Appl. Sci & Tech Abs 1983-2010/Oct
    (c) 2010 The HW Wilson Co.
File 256:TecTrends 1982-2010/Dec W2
    (c) 2010 Info.Sources Inc. All rights res.
File 139:EconLit 1969-2010/Dec
    (c) 2010 American Economic Association
File 169:Insurance Periodicals 1984-1999/Nov 15
    (c) 1999 NILS Publishing Co.
File 347:JAPIO Dec 1976-2010/Aug(Updated 101124)
    (c) 2010 JPO & JAPIO
File 350:Derwent WPIX 1963-2010/UD=201082
    (c) 2010 Thomson Reuters

```
Set      Items   Description
S1        243    AU=(MERVES, J? OR MERVES J? OR LONDON, M? OR LONDON M?)
S2         13    S1 FROM 348,349,350,347
S3         13    IDPAT S2 (sorted in duplicate/non-duplicate order)
S4          9    IDPAT S2 (primary/non-duplicate records only)
S5         12    S1 AND STRUCTURED
S6          8    S5 NOT S3
S7          7    RD  (unique items)
S8          0    S1 AND PRINCIPAL()PROTECTED
S9          1    S1 AND MORTGAGE?
S10         9    S9 OR S4
```

10/3K/1 (Item 1 from file: 349)
DIALOG(R)File 349: PCT FULLTEXT

00757111

STRUCTURED FINANCE PERFORMANCE ANALYTICS SYSTEM
SYSTEME ANALYTIQUE STRUCTURE D'ANALYSE DE PERFORMANCES FINANCIERES

Patent Applicant/Patent Assignee:

- **THE CHASE MANHATTAN BANK**
  270 Park Avenue, 41st Floor, New York, NY 10017; US; US(Residence); US(Nationality)

Inventor(s):

- **MERVES Jay**
  2 Diamond Court, West Windsor, NJ; US
- **LONDON Michael**
  540 West 33rd Street, 15th Floor, New York, NY 10001; US
- **MERVES Jay... ...LONDON Michael**

Legal Representative:

- **WEISBURD Steven I(et al)(agent)**
  Ostrolenk, Faber, Gerb & Soffen, LLP, 1180 Avenue of the Americas, New York, NY 10036; US

	Country	Number	Kind	Date
Patent	WO	200070493	A2	20001123
Application	WO	2000US13466		20000516
Priorities	US	99134470		19990517

Country	Number	Kind	Date
US	99470180		19991222

Designated States: (Protection type is "Patent" unless otherwise stated - for applications prior to 2004)
AE, AG, AL, AM, AT, AU, AZ, BA, BB, BG,
BR, BY, CA, CH, CN, CR, CU, CZ, DE, DK,
DM, DZ, EE, ES, FI, GB, GD, GE, GH, GM,
HR, HU, ID, IL, IN, IS, JP, KE, KG, KP,
KR, KZ, LC, LK, LR, LS, LT, LU, LV, MA,
MD, MG, MK, MN, MW, MX, NO, NZ, PL, PT,
RO, RU, SD, SE, SG, SI, SK, SL, TJ, TM,
TR, TT, TZ, UA, UG, UZ, VN, YU, ZA, ZW

[EP] AT; BE; CH; CY; DE; DK; ES; FI; FR; GB;
GR; IE; IT; LU; MC; NL; PT; SE;

[OA] BF; BJ; CF; CG; CI; CM; GA; GN; GW; ML;
MR; NE; SN; TD; TG;

[AP] GH; GM; KE; LS; MW; SD; SL; SZ; TZ; UG;
ZW;

[EA] AM; AZ; BY; KG; KZ; MD; RU; TJ; TM;
Language Publication Language: English
Filing Language: English
Fulltext word count: 13728

Detailed Description:

...originator) and one or more investors. There are many types of securities which may be issued in a
structured transaction, such as asset-backed securities, **mortgage**-backed securities, etc.

In an asset-backed security transaction, the issuer sells one or
1 5 more corporate obligations (often in the fonn of a... ...debt obligation(s) with the understanding that
the underlying pool of
assets
(such as accounts receivable, loans, etc.) affect their income from the security.

In **mortgage**-backed securities transactions, the corporate debt
obligations are secured by a pool of **mortgages**.

Issuers of structured financial securities are those entities who
generate financial assets in the normal course of their business. Such issuers include, but are not limited
to, banks, thrifts, **mortgage** companies, manufacturers and distributors with a financing division,
retailers with credit card or other finance operations, consumer finance companies, specialty finance

companies, equipment lessors, asset... ...to the investors who are parties to the deal. A potential investor (i.e., an investor who has not yet purchased an asset-backed or **mortgage**-backed security from the issuer) cannot readily obtain the reports from the trustee and/or service 1 5 provider. Thus, the issuer cannot easily use...information sources 20, 22, 24. An asset information source is typically an issuer of a structured security instrument, such as an asset-backed security or **mortgage**-backed security. The asset information sources 20, 22, 24 may also be servicer, trustees, holders of interests in the underlying debts of the deals, or...is desired. The screen preferably prompts the investor 30 to choose from a plurality of classes of
transactions, such as asset-backed securities (ABS) 101, **mortgage**-backed
securities (MBS) 103, and/or commercial **mortgage**-backed securities (CMBS) 105.

As discussed above, trustees provide static reports on a monthly
basis and these reports are preferably provided to the investor 30...class A loans - 20
and class C loans. Referring to Figures 6B and 6C, similar graphs may be
provided on screens relating to adjustable rate **mortgage** loans (see box 120).

Preferably, explanations and/or interpretations of the data in the
graphs of Figures 6A-6C are provided proximate to the graphs...

Claims:

...property.

4 The method of claim 3, wherein the class of structured
securities transaction includes at least one of an asset backed securities transaction, a **mortgage** backed securities transaction, and a consumer **mortgage** backed securities transaction.5 . The method of claim 3, wherein the credit grade is at leastone of A, B, and C/D.
6 The...Investor Reportina Structured Finance Investor Reporting
I@ Trustee Reporting SeePerformance Analy(section);a Performance Analytics Reports AdvoMy PortfolioAdvanced SearchI@ FAQs Commercial **Mortgage**-Backed SecuritiesI@ ModikM11'rofill Merril Lynch **Mortgage** Securities, Series 11998-ClChange My PasswQrdGet Report Add Deal To My Portfolio f DIIssue Documentationissue DOCUment Title NameOR 7... ...FInance FStructured Finance Investor Report ngL@eWPortfollo Trustee Reports Advanc61vanod -Lli -$as cIi Performance AnAlyti-Qli@ FAQs Commercial **Mortgage**-Backed SeCuritieSI, Modil Merril Lynch **Mortgage** Securities, Series 1998-ClILM ofileX PLli@ QLangt ftPalaWg-rdGet Repo--] Add Deal To MyA-IS Issue DocumentationII ssue Document...Links ALvmnAdvanced Search This deal is already in your portfolio.Performance AnalyticsFAQs CEGEMROLk MI ProffigI@ Change My P@ssword Commercial **Mortgage**-Backed SecuritiesMerril Lynch **Mortgage** Securities, Series 1998-ClUse these links to go directly to the home oage of the Issuef/Deljosilvi I hiderwriter. Seivic@ Trustee, or Rating Agency... ...ibis deal is already in your portfolio. FAQsP Advanced Search Rerricive Ram W Pop ioE6QjModify My Profilelo Chanae My Password Commercial **Mortgage**-Backed SecuritiesMerril Lynch **Mortgage** Securities. Series 1998-ClUse these links to go directly to the home oage of the lssuer!Depositor. Underwriter. Servicer. Scecial Servicer. Trustee. or Rating... ...Loan Group I will mature later than September 5, 2028. 7,531 of the Home Equity Loans in Loan Group I are secured by first **mortgages** representing 99.49% of the Loan Balance of the Home Equity Loans in Loan Group I

and 83 of the Home Equity loans in Loan Group I are secured by second lien **mortgages** representing in the aggregate o. 5 1 % of the Loan Balance of Low Group I Loans.6t 0 IZALoan Group 11As of the...in Loan Group IIa will mature later than September 1, 2028. All of the Home Equity Loans in Loan Group Ha are secured by first **mortgages**.qAWNWMMftTraf(section)action Pedormanc!*- nalyficsShoppe 2: Collateral Prepayments3 (@oPrepayments (%CPR)Projection At One-Month 3-month 6-month LifeTime of...

III. <u>Text Search Results from Dialog (Full Text dbs)</u>

A. Full-Text Databases – PATENT

File 348:EUROPEAN PATENTS 1978-200950
    (c) 2009 European Patent Office
File 349:PCT FULLTEXT 1979-2009/UB=20091210|UT=20091203
    (c) 2009 WIPO/Thomson

```
Set     Items   Description
S1    8617518   (STRUCTURED OR MARKET()LINKED OR MARKETLINKED OR
PRINCIPAL()PROTECTED OR UNDERLYING()(ASSET? ? OR INDEX OR INDICES OR RATES OR
CASHFLOW OR CASH()FLOW?))(3N)(FINANC??? OR INSTRUMENT? ? OR DEBT OR SECURIT??? OR
PRODUCT? ? OR INVESTMENT? ? OR PORTFOLIO? ? OR LOAN? ? OR MORTGAGE? OR CDO? ? OR
CMO? ? OR OBLIGATION? ? OR POOL?) OR OPTIONS OR DERIVATIVE? ? OR BASKET? ? OR FOREX
OR SWAP? ? OR FOREIGN()EXHANGE

S2    6379150   (INVESTOR? OR BUYER? OR HOLDER? OR RISK(2N)(TAKER OR ASSUM?) OR
LENDER? ? OR PURCHASER? OR TRUSTEE? OR SUBSCRIBER? OR CUSTOMER? ? OR CLIENTELE OR
BROKERAGE(2N)CLIENT? ? OR OWNER? ?) (4N)(ACCESS? OR SERVER? ? OR QUER? OR READ? OR
LEARN? OR EXPOS? OR DISCOVER? OR INTERFACE? ? OR STUD??? OR (CALL? OR PULL?)(2W)UP
OR SEARCH? OR RESEARCH? OR ANALY? OR LOOK?()AT OR DOWNLOAD? OR COMPUTER? OR
ELECTRONIC? OR ETRAD? OR E()TRAD? OR NETWORK? OR CYBER? OR USER? ? OR (USING OR
UPON OR ON OR WITHIN)(2W)(SCREEN? ? OR MONITOR OR LCD? ? OR LED? ? OR CRT? ?))

S3     806765   S1(F)S2
S4     259039   (DUE(2W)DILIGEN? OR INVESTIGAT? OR RISK(2N)(ASSESS? OR MANAG? OR
UNDERWRIT? OR PREMIUM) OR ANALY? OR TECHNICALS OR FUNDAMENTALS OR PERFORMANCE OR
PREPAYMENT OR DELINQUENCY OR LOSS OR CREDIT? OR BACKGROUND OR COUPON? ? OR ISSUER?
? OR SHARPE OR TRIGGER OR INDENTURE? OR HISTORIC? OR CHART? ? OR UNDERLYING? ? OR
MORTGAGE? OR TRANSACTION? OR LOAN? ? OR SECURITY OR TRACKING OR PAST OR RETURN OR
ROI OR VALU? OR TIME OR REWARD OR VARIABILITY OR VOLATILITY OR BETA OR BIAS OR
FORECLOSURE? OR PROSPECTUS()TYPE) (3W) (DATA? OR INFO OR INFORMATION OR STATISTIC?
OR READOUT? OR FUNDAMENTALS OR SOURCE? ? OR RESOURCE? ? OR ANALYTIC? OR CRUNCH? OR
RATIO? ? OR METRIC? OR RECORD OR TRACKRECORD? ? )

S5     31286   S2(12N)S4
S6      2984   S5(12N)S1
S7        59   S6 FROM 348,349
S8      2925   S6 NOT S7
S9       883   S8 AND STRUCTURED
S10      717   S9 AND (PERFORMANCE OR HISTORIC? OR TRIGGER OR CREDIT()LOSS OR
PREPAYMENT OR MORTGAGE OR DELINQUENCY)

S11        8   S7 NOT AY>1999
S12      152   RD S10  (unique items)
S13        7   S12 NOT PY>1999
S14        0   S7 AND IC=G08Q?
```

NO RELEVANT RESULS IDENTIFIED THIS SET

B. Full-Text Databases – NON-PATENT

File 485:Accounting & Tax DB 1971-2010/Dec W3
    (c) 2010 ProQuest Info&Learning
File 625:American Banker Publications 1981-2008/Jun 26
    (c) 2008 American Banker
File 268:Banking Info Source 1981-2010/Dec W3
    (c) 2010 ProQuest Info&Learning
File 626:Bond Buyer Full Text 1981-2008/Jul 07
    (c) 2008 Bond Buyer
File 267:Finance & Banking Newsletters 2008/Sep 29
    (c) 2008 Dialog
File 637:Journal of Commerce 1986-2010/Dec 18
    (c) 2010 UBM Global Trade
File 608:MCT Information Svc. 1992-2010/Dec 29
    (c) 2010 MCT Information Svc.
File 13:BAMP 2010/Dec 28
    (c) 2010 Gale/Cengage
File 75:TGG Management Contents(R) 86-2010/Dec W2
    (c) 2010 Gale/Cengage
File 95:TEME-Technology & Management 1989-2010/Oct W3
    (c) 2010 FIZ TECHNIK
File 647:UBM Computer Fulltext 1988-2010/Dec W3
    (c) 2010 UBM, LLC
File 674:Computer News Fulltext 1989-2006/Sep W1
    (c) 2006 IDG Communications
File 15:ABI/Inform(R) 1971-2010/Dec 28
    (c) 2010 ProQuest Info&Learning
File   9:Business & Industry(R) Jul/1994-2010/Dec 28
    (c) 2010 Gale/Cengage
File 610:Business Wire 1999-2010/Dec 29
    (c) 2010 Business Wire.
File 810:Business Wire 1986-1999/Feb 28
    (c) 1999 Business Wire
File 275:Gale Group Computer DB(TM) 1983-2010/Nov 11
    (c) 2010 Gale/Cengage
File 624:McGraw-Hill Publications 1985-2010/Dec 28
    (c) 2010 McGraw-Hill Co. Inc
File 621:Gale Group New Prod.Annou.(R) 1985-2010/Nov 02
    (c) 2010 Gale/Cengage
File 636:Gale Group Newsletter DB(TM) 1987-2010/Dec 28
    (c) 2010 Gale/Cengage
File 613:PR Newswire 1999-2010/Dec 29
    (c) 2010 PR Newswire Association Inc
File 813:PR Newswire 1987-1999/Apr 30

File 16:Gale Group PROMT(R) 1990-2010/Dec 21
File 160:Gale Group PROMT(R) 1972-1989
File 634:San Jose Mercury Jun 1985-2010/Dec 26
File 148:Gale Group Trade & Industry DB 1976-2010/Dec 28
File 20:Dialog Global Reporter 1997-2010/Dec 29

```
Set     Items    Description
S1     8617518   (STRUCTURED OR MARKET()LINKED OR MARKETLINKED OR
PRINCIPAL()PROTECTED OR UNDERLYING)(ASSET? ? OR INDEX OR INDICES OR RATES OR
CASHFLOW OR CASH()FLOW?))(3N)(FINANC??? OR INSTRUMENT? ? OR DEBT OR SECURIT??? OR
PRODUCT? ? OR INVESTMENT? ? OR PORTFOLIO? ? OR LOAN? ? OR MORTGAGE? OR CDO? ? OR
CMO? ? OR OBLIGATION? ? OR POOL?) OR OPTIONS OR DERIVATIVE? ? OR BASKET? ? OR FOREX
OR SWAP? ? OR FOREIGN()EXHANGE

S2     6379150   (INVESTOR? OR BUYER? OR HOLDER? OR RISK(2N)(TAKER OR ASSUM?) OR
LENDER? ? OR PURCHASER? OR TRUSTEE? OR SUBSCRIBER? OR CUSTOMER? ? OR CLIENTELE OR
BROKERAGE(2N)CLIENT? ? OR OWNER? ?) (4N)(ACCESS? OR SERVER? ? OR QUER? OR READ? OR
LEARN? OR EXPOS? OR DISCOVER? OR INTERFACE? ? OR STUD??? OR (CALL? OR PULL?)(2W)UP
OR SEARCH? OR RESEARCH? OR ANALY? OR LOOK?()AT OR DOWNLOAD? OR COMPUTER? OR
ELECTRONIC? OR ETRAD? OR E()TRAD? OR NETWORK? OR CYBER? OR USER? ? OR (USING OR
UPON OR ON OR WITHIN)(2W)(SCREEN? ? OR MONITOR OR LCD? ? OR LED? ? OR CRT? ?))

S3      806765   S1(F)S2
S4      259039   (DUE(2W)DILIGEN? OR INVESTIGAT? OR RISK(2N)(ASSESS? OR MANAG? OR
UNDERWRIT? OR PREMIUM) OR ANALY? OR TECHNICALS OR FUNDAMENTALS OR PERFORMANCE OR
PREPAYMENT OR DELINQUENCY OR LOSS OR CREDIT? OR BACKGROUND OR COUPON? ? OR ISSUER?
? OR SHARPE OR TRIGGER OR INDENTURE? OR HISTORIC? OR CHART? ? OR UNDERLYING? ? OR
MORTGAGE? OR TRANSACTION? OR LOAN? ? OR SECURITY OR TRACKING OR PAST OR RETURN OR
ROI OR VALU? OR TIME OR REWARD OR VARIABILITY OR VOLATILITY OR BETA OR BIAS OR
FORECLOSURE? OR PROSPECTUS()TYPE) (3W) (DATA? OR INFO OR INFORMATION OR STATISTIC?
OR READOUT? OR FUNDAMENTALS OR SOURCE? ? OR RESOURCE? ? OR ANALYTIC? OR CRUNCH? OR
RATIO? ? OR METRIC? OR RECORD OR TRACKRECORD? ? )

S5       31286   S2(12N)S4
S6        2984   S5(12N)S1
S7          59   S6 FROM 348,349
S8        2925   S6 NOT S7
S9         883   S8 AND STRUCTURED
S10        717   S9 AND (PERFORMANCE OR HISTORIC? OR TRIGGER OR CREDIT()LOSS OR
PREPAYMENT OR MORTGAGE OR DELINQUENCY)

S11          8   S7 NOT AY>1999
S12        152   RD S10  (unique items)
S13          7   S12 NOT PY>1999
S14          0   S7 AND IC=G08Q?
```

13/3,K/7 (Item 1 from file: 621)
DIALOG(R)File 621: Gale Group New Prod.Annou.(R)

01364037   **Supplier Number:** 46275793 **(USE FORMAT 7 FOR FULLTEXT)**
DCR UNVEILS NEW BLOOMBERG SERVICE

PR Newswire , p 0401NYM108
April 1 , 1996
Language: English   **Record Type:** Fulltext
Document Type: Newswire ; Trade
Word Count: 284
-
```
The new service can be found by typing DCR <GO> and following the
menu prompts to access DCR's various corporate or structured finance
offerings. A new "Hot Page" allows users to quickly consider the latest DCR
opinions on specific issuers while at the same time highlighting market...

...access research previously available only in print via their Bloomberg
terminal.
    DCR has also augmented the data it provides on a complimentary basis
by adding structured finance Transaction Summaries, Special
Reports and Credit Analysis reports to the Performance
Statistics it has long been providing.
    "This enhanced service offers investors better access to
a wide range of DCR research on issuers in North America, Europe, Latin
America and Asia," commented Peter J. Stahl, DCR executive vice president
...
```

....

13/3,K/6 (Item 1 from file: 275)
DIALOG(R)File 275: Gale Group Computer DB(TM)

01320538   **Supplier Number:** 07931076 **(Use Format 7 Or 9 For** FULL TEXT)
Software. (1990 Buyer's Guide Issue) (buyers guide)

Wall Street Computer Review , v7 , n2 , p27(95)
Nov , 1989
Document Type: buyers guide
ISSN: 0738-4343
Language: ENGLISH   **Record Type:** FULLTEXT; ABSTRACT
Word Count: 56121   **Line Count:** 04923

Abstract: ...engineering, corporate finance, database management, decision support and project
management, equities analysis, fixed income analysis, foreign exchange, graphics, insurance, investment
analysis, micro-to-mainframe links, **mortgage** backed securities pricing, mutual fund pricing, options

and futures, payroll, portfolio accounting, portfolio **performance** evaluation, portfolio management for brokers, portfolio management for money managers, program trading, prospecting for brokers, real estate investment analysis, sales support, spreadsheets, statistical analysis, stock...

Abstract:
...370 & up); Data General; Amdahl
      Automates commission calculations and combines all trade date for
detailed production and compensation reports. Also analyzes RR and product
line **performance**, research recommendations, and institutional
business. Accounts Payable System $ On Request
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      The proven high **performance**, distributed relational database
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      Almont **Analytical**, an American Banker Bond **Buyer** Co.,
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      Almont **Analytical** MBS **Database** System $900/month All
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      Specializes in GNMA, FNMA, FHLMC pools, **derivative** securities
and generics. Pool Inquiry hosts all needed data for the trader such as
prepayment speeds, factor history and settlement extension
calculator. Portfolio Manager is a customized report writer to monitor
portfolios with ease. Choose from over 100 different fields...Page 28
      Government Securities Management System (GSMS) $75/month per pool
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      Gives instant access to all available pool information online, both
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securities, futures, & options. Real-time market orientation, total
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Displays schedules and budgets...The system prices a corporate bond with embedded options in 1/3 of a second. Other securities include private placements, futures and options, mortgage-backed **securities**, bank assets, medium-term notes, GICs, liabilities. Applications include bond swap analysis, scenario testing, return attribution against an index, dedication, immunization, hedging. Integrative Bond System...

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JRS deliver Japanese security prices and historical financial **statement** to U.S. PC's for equity research, technical analysis and corporate finance applications.
Automated Reasoning Technologies, Inc., 975 Oak St., 6th Fl., Eugene, OR...True Compatibles
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Dimension 3000 Hewlett Packard
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500,000 securities. Automatic transaction generation for paydowns,
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...Fl., New York, NY 10155; Contact Paula McDonald, Dir.-Mktg.;
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Mortgage-Backed **Capabilities**
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thru security processing. Supports TBA trades with actual pool information
on purchases...303/329-3100 See Advertisement Page 61
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George Jigarjian; 617/449-6222, FAX: 617/444-2318 See Advertisement Pages
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    Calculations $395-$100,000 depending on functions and platform PC,
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415/986-6991, 800/445-5663, FAX: 415/986-1922 See Advertisement Page 32
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Fixed income system handling mortgage-backed **securities**.
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Complete portfolio management...

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...10022; Contact Jamie Waller; 212/888-6107, FAX: 212/888-2768 See Advertisement Page 100 PORTVUE IBM

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account performance against **indices**. SEGPERF runs performance
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...Pope; 303/329-3100 See Advertisement Page 61 The Expert Portfolio
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Optimize portfolio performance against **any** index/target using
securities, futures, & options. Real-time market orientation, total
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...FAX: 203/521-0396 See Advertisement Page 16 Passport PC/Network (Multi-user)

Portfolio management system with BAI standard time and dollar weighted performance, asset **groupings** for sector performance and **comparisons** with over 100 indices. Interport PC/Network

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...on unlimited number of securities and equity, fixed income and balanced portfolios.

Wall Street Analytics, 33-41 85th St., Jackson Heights, NY 11372

Structured Financing **Workstation** 386–PCs
Professional quality package for structuring, pricing, and valuating MBS including complex CMO/REMIC residuals. Includes Monte Carlo OAS capabilities.
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The only hard disk based system supporting equity research functions using Zacks, Compustat and Valueline databases. Particularly good choice for normal portfolio performance and **performance** fee **calculations**.
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...McDonald, Dir.-Mktg.; 212/755-4700, FAX: 212/755-4893
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Money Management Systems, 1000 Winter St., Waltham, MA 02154 MoneyMarket...terminal charges
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Produces 32 clear, comprehensive reports, performance and

analytical measures, detailed tax lot accounting, and decision support tools. Real-time interface wiht Lotus Signal available.
    Plaid Brothers Software, 17952 Skypark Circle, Suite K, Irvine...

...functions for option pricing & sensitivity analysis in spreadsheets. Modified black-Scholes and Binomial models. Holding cost and dividend adjustments. Delta, gamma, theta, etc. Historical and **implied** volatilities.
    mbs @nalyst $495
    Lotus 1-2-3 & Symphony, Microsoft Excel @ functions for mortgage-backed **security** calculations in spreadsheets. Level-payment and GPM's. Pass-throughs. IO's, PO's and other strips. CPR, PSA, FHA & custom prepayment curve **supported**.
    stats @nalyst $195
    Lotus 1-2-3 & Symphony, Microsoft Excel Add-in library of 48 probability and statistics functions for spreadsheets. Includes descriptive, parametric and...

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     Decision Programming, 8701 Georgia Ave...

...8438 See advertisement Pages 17, 134 Centerpiece $ On Request IBM PC's
& Compatibles
     Ideal system for money managers which contains easy-to-understand
performance reports.
     Financial Models Company, Inc., 60 Bloor Street West, Suite
306, Toronto, ON M4W 3B8 PACER DEC VAX/VMS
     Multicurrency, multilingual system supporting U.S. and international
...The system prices a corporate bond with embedded options in 1/3 of a
second. Other securities include private placements, futures and options,
mortgage-backed **securities**, bank leases, medium-term notes, GICs,
liabilities. Applications include bond swap analysis, scenario testing,
return attribution against an index, dedication, immunization, hedging.
Integrative Bond System...

...9370; S/88; Stratus
     Portfolio management and securities accounting system supporting
full-range of security types. Features include support of fixed-income

instruments, performance measurement **and** flexible reporting.
Information Systems of America, 500 Northridge Road, Atlanta, GA
30350; Contact ISA Sales Department; 404/548-6800, 800/554-1193, FAX:
404/587...

...Investment Manager I $1,500-$4,000 IBM and compatibles, DOS
The most automated, configurable single-user, in-house system with
asset allocation, performance and **an** integrated modular structure
with the most elegant growth path. Investment Manager II $8,000-$50,000 IBM
and Compatibles, UNIX platforms
The most comprehensive, in-house, multi-user system with relational
database flexibility, automated asset allocation, daily performance,
accruals **and** analytics. The integrated, modular system solution.
Interactive Data Corp., Portfolio Services Div., Corp. Headquarters,
95 Hayden Ave., Lexington, MA 02173; Contact Jean Privitera; 203/521...

...CMS; Service Bureau Multi-user portfolio management system handling over
35 asset types with trade/settlement accounting, automated income
processing, report writer, BAI performance measurement, **links** to
DTC, trading and analytical systems. Interport PC/Network
Interport, designed in London and installed worldwide, is a portfolio
management/ accounting system for multi-currency holdings, generates
valuations, accounting and performance measurement **reports.**
Investment Software Systems, Inc., 1000 Massachusetts Ave.,
Boxborough, MA 01719 ISS MarketData Services Sun, Wang
Integrates multiple digital data feeds which allows users to:
organize; interpret; manipulate; and display information distributed by
real-time and historical data **providers.** ISS MarketData Processor
Sun, Wang
Dynamically integrates real-time market data with real or model
portfolios. Data can be integrated with accounting systems, WP, PC...

...MA 02181 PMIS DEC VAX/VMS
Comprehensive multi-currency portfolio management system for
institutional investors or custodians. Application includes securities
database, portfolio accounting, performance measurement, **analysis,**
asset allocation, inquiry, trading and report generation.
Leveraged Technology, Inc., 61 Broadway, New York, NY 10006 Global
Security System $50K-$500K PC/LANs, HP-3000...terminal charges
A powerful real-time computation of portfolios. Values are computed
tick by tick and are available for monitoring on quote pages.
Performance Technologies, **4814** Old Wake Forest Road, Raleigh,
NC 27609 CENTERPIECE $ 895 IBM PC, XT, AT, PS/2 or Compatible
Produces 32 clear, comprehensive reports, performance and
analytical measures, detailed tax lot accounting, and decision
support tools. Real-time interface with Lotus Signal available.
Performance Technologies, **Inc.**, 4024 Barrett Dr., #202,
Raleigh, NC 27609 CENTERPIECE $ 895 IBM PC, XT, AT, PS/2 or Compatible
Produces 32 clear, comprehensive reports, performance and
analytical measures, detailed tax lot accounting, and decision
support tools. Real-time interface with Lotus Signal available.
Phoenix Systems, Inc., 2970 Clairmont Road, Suite 900, Atlanta...

...Systems
Multiple currency portfoio management & accounting software.
Integrated to quote services and back office systems. Links to word
processing & general ledger software.

Reuters Historical Information, **2049** Century Park E., Los angeles, CA 90052 Pricelink

A mainframe-based financial downloading service that provides domestic and interntional historical and **current** pricing data, currency and money market rates, indices and market indicators for analyses in several spradsheet formats on the PC.

Reuters Historical Information, **153** Kearney At., san Francisco, CA 94101 Pricelink

A mainframe-based financial downloading service that provides domestic and international historical and **current** pricing data, currency and money market rates, indices and market indicators for analyses in several spreadsheet formats on the PC.

Reuters Historical Information, **55** W. Monroe St., Chicago, IL 60603 Pricelink

A mainframe-based financial downloading service that provides domestic and international historical and **current** pricing data, currency and money market rates, indices and market indicators for analyses in several spreadsheet formats on the PC.

Reuters Historical Information, **53** State St., Boston, MA 02109 Pricelink

A mainframe-based financial downloading service that provides domestic and international historical and **current** pricing data, currency and money market rates, indices and market indicators for analyses in several spreadsheet formats on the PC.

Reuters Historical Information, **61** Broadway, Manhattan, NY 10006 Pricelink

A mainframe-based financial downloading service that provides domestic and international historical and **current** pricing data, currency and money market rates, indices and market indicators for analyses in several spreadsheet formats on the PC.

Reuters Historical Information, **121** King St. W., Toronto, ON M5H 3X5 Pricelink

A mainframe-based financial downloading service that provides domestic and international historical and **current** pricing data, currency and money market rates, indices and market indicators for analyses in several spreadsheet formats on the PC.

Reuters Historical Information, **2600** SW Frwy., Houston, TX 77013 Pricelink

A mainframe-based financial downloading service that provides domestic and international historical and **current** pricing data, currency and money market rates, indices and market indicators for analyses in several spreadsheet formats on the PC.

SD Financial, Inc., 101 Main...

...10022; Contact Jamie Waller; 212/888-6107, FAX: 212/888-2768 See Advertisement Page 100 PORTVUE IBM

System provides automated portfolio management and performance measurement **systems** to independent investment advisors, banks, broker/dealers and insurance companies.

SEI Corp., 680 E. Swedesford Road, Wayne, PA 19087 INVEST 3000 IBM 3090, 438X, 9370 Request IBM & Compatibles (MS-DOS)

Microcomputer based real time portfolio management system. Over 100 reports, BAI performance measurement, **flexible** report writer, client billing system. Integrate with real time marketdata, 3rd party software.

Social Software, 250 S. End Ave., #317, New York, NY 10280 Tech...

...functions for option pricing & sensitivity analysis in spreadsheets. Modified Black-Scholes and Binomial models. Holding cost and dividend adjustments. Delta, gamma, theta, etc. Historical and **implied** volatilities. mbs @nalyst $495 Lotus 1-2-3 & Symphony, Microsoft Excel

@ functions for mortgage-backed **security** calculations in spreadsheets. Level-payment and GPM's. Pass-throughs. IO's, PO's and other strips. CPR, PSA, FHA & custom prepayment curve **supported.** stats @nalyst $195 Lotus 1-2-3 & Symphony, Microsoft Excel

Add-in library of 48 probability and statistics functions for spreadsheets. Includes descriptive, parametric and...

...Contact R. Hobbs; 206/747-5598, 800/826-8082 See Advertisement Page 32 PFPRO $695 IBM PCs/Compatibles

Provides portfolio management with ROI performance reporting **of** money managers. Virtually all security and transaction types. Fee computation and price downloading.

Thompson Financial Networks, First Call, 11 Farnsworth St., Boston, MA 02210 First...

...portfolio management for those utilizing mutual funds as the primary investment vehicle. This integrated package combines portfolio management with technical analysis. Produces composite performance figures.

Towers Data Systems, 8033 Herb Farm Dr., Bethesda, MD 20817; Contact Jim Hendren; 301/469-6699, FAX: 301/469-6714 See Advertisement Pages 96-97 Valport...

...bonds. Includes a user report writer, 9 types of amortization (level yield), 3 methods of pricing over 100 standard reports, a bond calculator, mortgage calculator, **bond** swapper, GL interface. Multi and single user versions.

Wyatt Software Services, Inc., 5335 SW Meadows Road, Suite 200, Lake Oswego, OR 97035

AIM (Asset Investment...6475 Christie Ave., Emeryville, CA 94608 Sybase $2,495-$100,000

VMS, UNIX, HP, IBM, PC's, Stratus, Apple, Next

The proven high performance, distributed **relational** database management and development system for on-line applications. Only Sybase handles both transaction processing and decision support with one system.

TMI Engineering, London Terrace...duration, convexity, and others. Calculates total return. Handles interest at maturity, odd, stepped, or unequal coupon calculations. Works with Intex MBS calculations. Intex Mortgage Backed **Securities** Calculations $395-$695 PC, Mini, Mainframe, Lotus 1-2-3

Computes quotd and cashflow yield, price, duration, weighted average life, balance, principal, interest, total payments. Advanced handles implied prepayment rates, **index** ARM's, total return, BEY. Intex CMO Calculations $695 PC, Mini, Mainframe, Lotus 1-2-3

Provides a comprehensive set of calculations and analytical tools... functions for option pricing & sensitivity analysis in spreadsheets. Modified Black-Scholes and Binomial models. Holding cost and dividend adjustments. Delta, gamma, theta, etc. Historical and **implied** volatilities. mbs @nalyst $495

Lotus 1-2-3 & Symphony, Microsoft Excel @ functions for mortgage-backed **security** calculations in spreadsheets. Levelpayment and GPM's. Pass-through. IO's, PO's and other strips. CPR, PSA, FHA & custom prepayment curve **supported.** stats @nalyst $195

Lotus 1-2-3 & Symphony, Microsoft Excel Add-in library of 48

probability and statistics functions for spreadsheets. Includes descriptive, parametric and...

...100 S. Wacker Dr., Suite 1506, Chicago, IL 60606 TA-SRV $350 286/386 Compatibles

Real time multitasking data server provides live and historic quotes **to** Microsoft Excel, Real Tick III and other compatibles programs. Uses Microsoft DDE protocol.

UniPress Software, 2025 Lincoln Hwy., Edison, NJ 08817; Contact Sue Glassberg; 201...DOS, Signal Windows, Metastock

Ranks all NYSE & major OTC stocks every night. Based on up to 30 short and long-run technical indicators. Historical data **also** available.

FAME Software Corp., 77 Water St., 22nd Fl., New York, NY 10043 FAMES's Research-Pak $ On Request DEC(VMS) IBM (370 VM)

Software which integrates commercial and private historical databases **such** as fundamental, pricing, economic and earnings estimates, enabling screening and analysis of any combination. Seamless PC $ On Request DEC(VMS)

From within LOTUS, pop up menus to directly screen and download historical financial **data** stored on your host computer without needing intermediate files.

...IBM compatible PC's

Backoffice administration of investment products with multiple investors-partnerships, REIT's, trusts, mutual funds, prepares 1099's, K1's, mortgage servicing, **broker**-dealers commissions and all supporting schedules.

Emerging Market Technologies, 3781 Presidential Pkwy., Suite 10, Atlanta, GA 30341; Contact Jeffrey Multz; 404/457-2110, FAX: 404...

...user to import other indicators.

Aspen Research Group, Box 1370, Glenwood Springs, CO 81601 Apex $ On Request IBM or Compatibles

Real-time and historical technical **analysis** systems for futures equities/forex/fixed income. High-resolution graphics, video news, flexible quote screens, PC-based. Demo disk available.

Automated Investments, 3284 Yonge St...DOS, Signal Windows, Metastock

Ranks all NYSE & major OTC stocks every night. Based on up to 30 short and long-run technical indicators. Historical data **also** available. Stock Market Predictor $3,000 MS/DOS, Signal Windows

Permits detailed testing and analysis of EIA ranking algorithm. User can vary importance of indicators create historical ranking **data** bases, and test for performance.

Fortunet, **Inc.**, 2995 Woodside Road, #400, Woodside, CA 94062

Futures Software Associates, Inc., Box 263, Lima, PA 19037 Market Research Language $499 IBM PC, XT, AT, System covering all major markets. Includes integrated communications and data management modules for automatic downloading of historical and **daily** updating of data. Market Maker International $795 IBM PC, AT, PS/2, 386

Same as Marker Maker but database coverage includes access to historical data **on** all major markets in over 50 countries, usually within a local phone call from anywhere in the world.

Intermountain, 10900 NE 8th St., #900, Bellevue...

...analysis capabilities.

Knight-Ridder Commodity News Services, 2100 W. 89th St., Leawood, KS 66206 CNS Analyst II IBM PC

Blends technical analysis and historical charts, **real**-time futures and options quotes, worldwide news and commodity cash prices into one system. Includes CBOT Market Profile (R). MoneyCenter AT&T PC
Offers international and domestic futures and options, equities, cash foreign exchange and U.S. government securities quotes, worldwide news, cash commodity prices plus intraday and historical charts.
Market Trend Software, RD 1, Box 193C, Rome, NY 13440 Major Market Move Indicator (MMMI) $89.95 IBM PC
The MMMI is a trend indicator for...
...the charting capabilities of Master Chartist.
RTR Software, Inc., 3901 N. Mesa, #407, EI Paso, TX 79902 TechniFilter Plus $299 Various Data Sources
Historical testing **and** optimizing of user supplied trading systems. Technical screening of large databases for user supplied criteria.
Savant Corp., 11211 Katy Frwy., Suite 250, Houston, TX 77079...

...directly supported.
Townsend Analytics, 100 S. Wacker Dr. Suite 1506, Chicago IL 60606 Real Tick III $1,200 286/386 Compatibles
Real time & historic graphics **of** equities, futures, stocks and indicies. ...Estate
Administration
Comcon Associates, Inc., Box 1368, Golden, CO 80402 MORTS-80 (TM) $4,495 IBM PC-XT, AT, and PS/2
Residential Mortgage Loan **Servicing** and Accounting system designed for the small to medium size lender. Features include: Investor Reporting, IRS Forms Generation, Escrow Analysis.
Dynatron Corp., 210 Automation Way...

...systems: IBM OS, MVS; Language: COBOL
A real-time modular system supporting securities trading, clearance and custody. Includes extensive automated links to DTC, mortgage-backed **processing** and a program trading interface for trade list processing.
M & I Data Services, 770 N. Water St., Milwaukee, WI 53202 M&I Trust Services & Software...

...3000 IBM 3090, 438X, 9370
An on-line trust accounting and management information system that supports portfolio analysis, investment accounting, trade-order processing, performance measurement, **employee** benefit and client administration. Security Movement and Control (SMAC), an integrated Subsystem of TRUST 3000, controls the movement of securities from execution through settlement.
Shepard...

...without spending long hours doing complex mathematical calculations and filling out routine forms.
Synthetic Intelligence, Inc., 286 5th Ave., New York, NY 10001 Mortgage System $**1**,700 & Up IBM-PC/MAC
Automatically update the variable interest rate with prime rate variation. Give history & managerial information distributed by ledger (VA, FHA, etc...Opt-Tech Data Processing, Box 678, Zephyr Cove, NV 89448 Opt-Tech Sort $149 IBM PC/XT/AT/PS/2
General purpose, high performance sort/**merge**/select utility. Can be called from programs or used as standalone routine. Scroll & Recall $69 IBM PC/AT/XT/PS/2

```
      Allows you to page...100 S. Wacker Dr., Suite 1506, Chicago, IL 60606
TA-SRV $350 286/386 Compatibles
      Real time multitasking data server provides live and historic quotes
to Microsoft Excel, Real Tick III and other compatibles programs.
Uses Microsoft DDE protocol. Real Tick III $1,200 286/386 Compatibles
      Real time & historic graphics of equities, futures, stocks
and indicies. Implemented under Microsoft Windows. Many technical studies
plus CBOT market profile(R) on multiple programmable pages. Option Risk
Management 286...

...Harvey Sontag; 516/248-1608, FAX: 516/741-1861 See Advertisement Page 81
Dimension 3000 Hewlett Packard
      Portfolio management software, encompassing MBS, accounting,
performance evaluation, trading system, and dynamic financial
reporting system for professional money managers and institutional
investors.
      Alpine Data, Inc., 737 S. Townsend Ave., Montrose, CO 81401 OIL/PACK
...section 89.
      Comcon Associates, Inc., Box 1368, Golden, CO 80402 MORTS-80 (TM)
$4,495 IBM PC-XT, AT, and PS/2
      Residential Mortgage Loan Servicing and Accounting system
designed for the small to medium size lender. Features include: Investor
Reporting, IRS Forms Generation, Escrow Analysis.
      Computer Associates International, Inc., 711...ProMod/SART
$2,995/base MS-DOS and Digital VMS
      Part of the CASE (Computer Aided Software Engineering) tools from
Promod Inc., supports Structured Analysis (Yourdon/DeMarco) with
Real Time Extensions (Boeing/Hatley), and includes extensive consistency
and completeness checking with automatic leveling and balancing. Multiple
reports for graphical and textual resource, utilization, service
levels, throughput and threshold exceptions.
      TCAM Systems, Inc., 50 Broad St., New York, NY 10004; Contact Jay
Fuchs; 212/269-0200, FAX: 212/344...
```

13/3,K/5 (Item 1 from file: 610)
DIALOG(R)File 610: Business Wire

00134912 19991108312B1689 **(USE FORMAT 7 FOR FULLTEXT)**
The Chase Manhattan Bank Introduces New On-Line Trustee Reporting Capabilities

Business Wire
Monday , November 8, 1999 15:10 EST
Journal Code: BW **Language:** ENGLISH **Record Type:** FULLTEXT **Document Type:**
NEWSWIRE
Word Count: 590

Text:
```
 ...of an enhanced Trustee Reporting website at
www.chase.com/sfa. The site is an on-line information reporting
```

mechanism for investors in asset-backed, **mortgage**-backed, and commercial **mortgage**-backed securities.

Based on Chase Capital Markets Fiduciary Services' extensive expertise in the **structured finance** services business, the site provides
investors with real-time **access** to current and
historical data for ABS,
MBS, and CMBS securitizations. Enhancements to the site include an easy-to-use "My Portfolio" function that enables users to build a personalized...

...to the changing demands of the marketplace."

Designed to be comprehensive and easy-to-use, this online service provides real-time access to current and **historical** data for ABS, MBS,
and CMBS securitizations, including periodic files and reports which provide monthly loan level data, surveillance reports, and certificate holders statements. The...

...and rating agencies for each transaction.

"Chase is firmly committed to providing trustee and related services to these markets," said Tyrone Po, product manager for **Structured** Finance
Services. "We are also constantly developing and enhancing our systems and our Internet capabilities to meet the evolving needs of issuers and their underwriters...

...enhancements to www.chase.com/sfa are evidence
of our ability to deliver added value to our customers."

"For the deals that Standard & Poor's **Structured** Finance Group rates,
it is extremely helpful to have all of the certificate holders' statements and other information updated, ready, and organized on the Chase...

...our preferred method of obtaining
information on securitizations, and Chase's "My Portfolio" feature greatly improves our efficiency," says Omay Tsuei of Standard & Poor's **Structured** Finance group.

With U.S. $371 billion in assets as of September 30, 1999, The Chase Manhattan Corporation is among the largest financial services companies...

...31 major cities across the globe. With more
than $3 trillion in assets currently under administration, Chase is a leading provider of corporate, municipal and **structured** debt services
to issuers, intermediaries and investors worldwide.

```
CONTACT:        Chase Capital Markets Fiduciary...
```

Company Names:
...**STRUCTURED** FINANCE CORP

Geographic Names:

IV. Text Search Results from Dialog (Abstract dbs)

A. Abstract Databases -- Patent

File 347:JAPIO Dec 1976-2009/Nov(Updated 100228)
     (c) 2010 JPO & JAPIO
File 350:Derwent WPIX 1963-2010/UD=201019
     (c) 2010 Thomson Reuters

```
Set   Items  Description
S1      909308   (STRUCTURED OR MARKET()LINKED OR MARKETLINKED OR
PRINCIPAL()PROTECTED OR UNDERLYING()(ASSET? ? OR INDEX OR INDICES OR RATES OR
CASHFLOW OR CASH()FLOW?))(3N)(FINANC??? OR INSTRUMENT? ? OR DEBT OR SECURIT??? OR
PRODUCT? ? OR INVESTMENT? ? OR PORTFOLIO? ? OR LOAN? ? OR MORTGAGE? OR CDO? ? OR
CMO? ? OR OBLIGATION? ? OR POOL?) OR OPTIONS OR DERIVATIVE? ? OR BASKET? ? OR FOREX
OR SWAP? ? OR FOREIGN()EXHANGE)

S2        3406   (INVESTOR? OR BUYER? OR HOLDER? OR RISK(2N)(TAKER OR ASSUM?) OR
LENDER? ? OR PURCHASER? OR TRUSTEE? OR SUBSCRIBER? OR CUSTOMER? ? OR CLIENTELE OR
BROKERAGE(2N)CLIENT? ? OR OWNER? ?) (4N)(ACCESS? OR SERVER? ? OR QUER? OR READ? OR
LEARN? OR EXPOS? OR DISCOVER? OR INTERFACE? ? OR STUD??? OR (CALL? OR PULL?)(2W)UP
OR SEARCH? OR RESEARCH? OR ANALY? OR LOOK?()AT OR DOWNLOAD? OR COMPUTER? OR
ELECTRONIC? OR ETRAD? OR E()TRAD? OR NETWORK? OR CYBER? OR USER? ? OR (USING OR
UPON OR ON OR WITHIN)(2W)(SCREEN? ? OR MONITOR OR LCD? ? OR LED? ? OR CRT? ?))

S3        2187   S1(F)S2

S4         398   (DUE(2W)DILIGEN? OR INVESTIGAT? OR RISK(2N)(ASSESS? OR MANAG? OR
UNDERWRIT? OR PREMIUM) OR ANALY? OR TECHNICALS OR FUNDAMENTALS OR PERFORMANCE OR
PREPAYMENT OR DELINQUENCY OR LOSS OR CREDIT? OR BACKGROUND OR COUPON? ? OR ISSUER?
? OR SHARPE OR TRIGGER OR INDENTURE? OR HISTORIC? OR CHART? ? OR UNDERLYING? ? OR
MORTGAGE? OR TRANSACTION? OR LOAN? ? OR SECURITY OR TRACKING OR PAST OR RETURN OR
ROI OR VALU? OR TIME OR REWARD OR VARIABILITY OR VOLATILITY OR BETA OR BIAS OR
FORECLOSURE? OR PROSPECTUS()TYPE) (3W) (DATA? OR INFO OR INFORMATION OR STATISTIC?
OR READOUT? OR FUNDAMENTALS OR SOURCE? ? OR RESOURCE? ? OR ANALYTIC? OR CRUNCH? OR
RATIO? ? OR METRIC? OR RECORD OR TRACKRECORD? ? )


S5         147   S2(15N)S4

S6         101   S5(S)S1

S7          57   S6 FROM 347,350

S8          44   S6 NOT S7
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S9        43   RD  (unique items)
S10       14   S9 NOT PY>1999
S11        8   S7 NOT AY>1999
S12        0   S4 AND PREPAYMENT()ANALYSIS
S13        0   S4 AND CREDIT()LOSS
S14        5   S4 AND PERFORMANCE()DATA
S15        5   S14 FROM 347,350
S16        2   S15 NOT AY>1999
```

11/3,K/7 (Item 4 from file: 350)
DIALOG(R)File 350: Derwent WPIX
(c) 2010 Thomson Reuters. All rights reserved.

0008243753 *Drawing available*
WPI Acc no: 1997-350581/199732
Related WPI Acc No: 1999-633502
XRPX Acc No: N1997-290646
**Method of creating single mortgage documents with multi-part obligation - involves actuating
digital computer to calculate mortgage obligations and terms from acquired data and
identification**
Patent Assignee: OPPENHEIMER R H (OPPE-I)
Inventor: OPPENHEIMER R H

Patent Family (1 patents, 1 countries)							
Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
US 5644726	A	19970701	US 1989356853	A	19890525	199732	B
			US 1990495393	A	19900319		

Priority Applications (no., kind, date): US 1989356853 A 19890525; US 1990495393 A 19900319

Patent Details					
Patent Number	Kind	Lan	Pgs	Draw	Filing Notes
US 5644726	A	EN	20	3	C-I-P of application US 1989356853

Original Publication Data by AuthorityArgentina**Publication No. ...Claims:**issuer regarding the terms
of multi-part mortgage obligations into the digital computer,(b) acquiring customer identifications from
potential mortgagors as to financing requirements and **options**;(c) applying the acquired identifications
into the digital computer,(d) storing the acquired data and identifications in the digital computer,(e)
actuating the digital computer to calculate mortgage obligations and terms...

0009814448 *Drawing available*
WPI Acc no: 2000-104749/200009
XRPX Acc No: N2000-080413
Computer control system for coin operated vending apparatus for dispensing food and nonfood products
Patent Assignee: JOHNSON A A (JOHN-I)
Inventor: JOHNSON A A

Patent Family (1 patents, 1 countries)							
Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
US 6000522	A	19991214	US 1995497997	A	19950612	200009	B
			US 1997881021	A	19970623		

Priority Applications (no., kind, date): US 1995497997 A 19950612; US 1997881021 A 19970623

Patent Details				
Patent Number	Kind	Lan	Pgs	Draw	Filing Notes
US 6000522	A	EN	22	13	C-I-P of application US 1995497997

Alerting Abstract ...ADVANTAGE - **Performance data** is transmitted to personal computer using modem, so owner of the vending machine can monitor the performance of the machine from remote place. The coin... Original Publication Data by AuthorityArgentina**Publication No. ...Original Abstracts:**logic order of operations, in selectively dispensing a variety of products, from a coin operable vending machine after currency protocols have been satisfied, fetch data **transactions**, store to **memory**, and when called by a personal computer, transmit the stored data to owners personal computers or other peripheral operated devices, the present computer controlled vending... ...**Claims:**of individual transparent compartment doors,a central computer which operates the vending machine according to a program of operations and stores data indicative of the **performance** of the vending **machine**,a modem that **can** access the **data** stored in the computer and transmit the data to a personal computer,a plurality of multiple micro coin acceptor units having flip flop circuitry whereby...

B. Abstract Databases – NON-PATENT

File 35:Dissertation Abs Online 1861-2010/Nov
     (c) 2010 ProQuest Info&Learning
File 583:Gale Group Globalbase(TM) 1986-2002/Dec 13
     (c) 2002 Gale/Cengage
File 65:Inside Conferences 1993-2010/Dec 23
     (c) 2010 BLDSC all rts. reserv.
File   2:INSPEC 1898-2010/Dec W2
     (c) 2010 The IET
File 474:New York Times Abs 1969-2010/Dec 28
     (c) 2010 The New York Times
File 475:Wall Street Journal Abs 1973-2010/Dec 28
     (c) 2010 The New York Times
File 99:Wilson Appl. Sci & Tech Abs 1983-2010/Oct
     (c) 2010 The HW Wilson Co.
File 256:TecTrends 1982-2010/Dec W2
     (c) 2010 Info.Sources Inc. All rights res.
File 139:EconLit 1969-2010/Dec
     (c) 2010 American Economic Association
File 169:Insurance Periodicals 1984-1999/Nov 15
     (c) 1999 NILS Publishing Co.

Set   Items Description
```
S1     909308   (STRUCTURED OR MARKET()LINKED OR MARKETLINKED OR
PRINCIPAL()PROTECTED OR UNDERLYING()(ASSET? ? OR INDEX OR INDICES OR RATES OR
CASHFLOW OR CASH()FLOW?))(3N)(FINANC??? OR INSTRUMENT? ? OR DEBT OR SECURIT??? OR
PRODUCT? ? OR INVESTMENT? ? OR PORTFOLIO? ? OR LOAN? ? OR MORTGAGE? OR CDO? ? OR
CMO? ? OR OBLIGATION? ? OR POOL?) OR OPTIONS OR DERIVATIVE? ? OR BASKET? ? OR FOREX
OR SWAP? ? OR FOREIGN()EXHANGE

S2       3406   (INVESTOR? OR BUYER? OR HOLDER? OR RISK(2N)(TAKER OR ASSUM?) OR
LENDER? ? OR PURCHASER? OR TRUSTEE? OR SUBSCRIBER? OR CUSTOMER? ? OR CLIENTELE OR
BROKERAGE(2N)CLIENT? ? OR OWNER? ?) (4N)(ACCESS? OR SERVER? ? OR QUER? OR READ? OR
LEARN? OR EXPOS? OR DISCOVER? OR INTERFACE? ? OR STUD??? OR (CALL? OR PULL?)(2W)UP
OR SEARCH? OR RESEARCH? OR ANALY? OR LOOK?()AT OR DOWNLOAD? OR COMPUTER? OR
ELECTRONIC? OR ETRAD? OR E()TRAD? OR NETWORK? OR CYBER? OR USER? ? OR (USING OR
UPON OR ON OR WITHIN)(2W)(SCREEN? ? OR MONITOR OR LCD? ? OR LED? ? OR CRT? ?))

S3       2187   S1(F)S2

S4        398   (DUE(2W)DILIGEN? OR INVESTIGAT? OR RISK(2N)(ASSESS? OR MANAG? OR
UNDERWRIT? OR PREMIUM) OR ANALY? OR TECHNICALS OR FUNDAMENTALS OR PERFORMANCE OR
PREPAYMENT OR DELINQUENCY OR LOSS OR CREDIT? OR BACKGROUND OR COUPON? ? OR ISSUER?
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? OR SHARPE OR TRIGGER OR INDENTURE? OR HISTORIC? OR CHART? ? OR UNDERLYING? ? OR
MORTGAGE? OR TRANSACTION? OR LOAN? ? OR SECURITY OR TRACKING OR PAST OR RETURN OR
ROI OR VALU? OR TIME OR REWARD OR VARIABILITY OR VOLATILITY OR BETA OR BIAS OR
FORECLOSURE? OR PROSPECTUS()TYPE) (3W) (DATA? OR INFO OR INFORMATION OR STATISTIC?
OR READOUT? OR FUNDAMENTALS OR SOURCE? ? OR RESOURCE? ? OR ANALYTIC? OR CRUNCH? OR
RATIO? ? OR METRIC? OR RECORD OR TRACKRECORD? ? )


S5      147   S2(15N)S4

S6      101   S5(S)S1

S7       57   S6 FROM 347,350

S8       44   S6 NOT S7

S9       43   RD  (unique items)

S10      14   S9 NOT PY>1999

S11       8   S7 NOT AY>1999

S12       0   S4 AND PREPAYMENT()ANALYSIS

S13       0   S4 AND CREDIT()LOSS

S14       5   S4 AND PERFORMANCE()DATA

S15       5   S14 FROM 347,350

S16       2   S15 NOT AY>1999
```

10/5,K/2 (Item 1 from file: 583)
DIALOG(R)File 583: Gale Group Globalbase(TM)

06179462
MobileQuote gets a five-fold boost

HONG KONG: MOTOROLA LAUNCHES NEW MOBILEQUOTE
South China Morning Post (XKT)   18 Jul 1995   TP p.5
Language: ENGLISH

Motorola AirCommunications has launched a new version of MobileQuote in Hong Kong. The wireless
investment services application will provide mobile and immediate financial information 24 hours a day
and will enable **investors** to track, **analyse** and **chart forex information**. It will use Motorola's Personal
Messenger PM100D wireless modem to communicate over AirComms network. The **forex** and data
news will be supplied by Knight-Ridder and stock market information will come directly from the Hong
Kong Stock Exchange. *

Company: HONG KONG STOCK EXCHANGE; KNIGHT-RIDDER; MOTOROLA

AIRCOMMUNICATIONS

Product: Computer Software (7372);
Event: Product Design & Development (33);
Country: Hong Kong (9HON); United States (1USA);

10/5,K/11 (Item 9 from file: 2)
DIALOG(R)File 2: INSPEC

04680498
Title: Users reveal their mortgage-backed securities software strategies
Author(s):   Koflowitz, L.; Kulkosky, V.
Journal: Wall Street Computer Review , vol.7 , no.7 , pp.30-6, 58, 74, 75
Country of Publication: USA
Publication Date: April 1990
ISSN: 0738-4343
ISSN Type: print
CODEN: WSCRDQ
Language: English
Document Type: Journal Paper (JP)
Treatment: Practical (P)
Abstract: This report discusses the systems and services institutions are using now and the advantages
and benefits they preceive from these systems. Software and services that assist in MBS activities fall
into roughly three categories. First, there are many products devoted exclusively to analyzing, trading
and processing mortgage-backed and their cousins, collateralized mortgage obligations (CMOs).
Second, there are online databases and services that provide the vast, complex and difficult-to-compile
data on MBS in addition to offering trading, **analytic** and processing services to **customers** who prefer
to farm out their MBS work. Finally, general-purpose portfolio management and accounting systems
that provide MBS modules or features round out the available **options**. (*0 refs.*)
Subfile(s):   D (Information Technology for Business); E (Mechanical & Production Engineering)
Descriptors: investment; securities trading; software packages
Identifiers: mortgage-backed securities; software strategies; collateralized mortgage obligations;
online databases; portfolio management; accounting systems
Classification Codes: D2050F (IT in financial markets); E0410F (Business applications of IT)
INSPEC Update Issue: 1990-017
Copyright: 1990, IEE
Abstract: ...CMOs). Second, there are online databases and services that provide the vast, complex and
difficult-to-compile data on MBS in addition to offering trading, **analytic** and processing services to
customers who prefer to farm out their MBS work. Finally, general-purpose portfolio management and
accounting systems that provide MBS modules or features round out the available **options**.

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V. <u>Additional Resources Searched</u>

No additional results of relevance found in the additional databases identified in the coverpage correspondence.